Narrative Statements to Accompany the City of Medford Consolidated Annual Performance and Evaluation Report for Fiscal Year 2003/04 on the Use of CDBG Funds

I. Assessment of Five-Year Goals and Strategies

Goals and strategies of the Strategic Plan from Medford’s Consolidated Plan for Housing and Community Development, 2000/05 followed by implementation activities undertaken during the 2003/04 program:

HOUSING

Goal 1: To Increase the Supply of Rental Housing for Low-Income Households.

Strategy 1-2. Encourage agencies to apply for additional rental subsidies to increase the number of families assisted. (C)

Activity 1:
The Housing Authority of Jackson County had 1414 Housing Choice vouchers available at the beginning of the 2003/04 program year. All of these housing vouchers were used during the year. As it has in previous years, the Housing Authority continues to apply to HUD for additional vouchers and certificates to decrease the long waiting list, which is currently at three and a half years, of families desiring rental assistance. They are processing October 2001 applications at this time. Although an application was made this year, no further vouchers were granted.

Strategy 1-3. Support providers of public housing. (C)

Activity 1:
The Housing Authority of Jackson County is developing 80 units of low-income, rental housing on Cummings Road using tax credit financing, HOME funds, and an operating subsidy from the Rural Development program. The project, known as Lilac Meadow is for 50% of median income and below. Phase III, which involves 42 units low income tax credit financed rental housing, has been fully leased as of September 2004. Phase I and II are for year round farm workers and for migrant farm workers. Both phases are due to be complete by October 2004.

Goal 1: To increase the supply of rental housing for low-income households.

Activity 1:
The Housing Authority of Jackson County was granted $194,000 of CDBG funds to rehabilitate 86 low to moderate income dwelling units of an existing apartment complex thereby allowing it to remain affordable housing for 86 families. The rehabilitation
included the replacement of roofing and the replacement of windows and glass doors for maintenance and weatherization.

**Activity 2:**  
Living On Track, a limited partnership between two nonprofits; one of which works with the developmentally disabled and the other with substance abuse, has applied for tax credit and funding for Oregon State to develop 63 new rental units for residents who are 30 to 50% of the median income and for special needs persons. The City allocated $64,400 of CDBG funds towards this project which will be used for infrastructure development. Living On Track is awaiting word from the State of Oregon as to the success of its funding application and will expend these funds as soon as they receive word that their application received funding.

**Goal 2:**  
To Provide and Maintain Home Ownership Opportunities for Low-Income Households.

**Strategy 2-1. Retain existing affordable housing by supporting rehabilitation programs. (A)**

**Activity 1:**  
The City has provided the Rogue Valley Community Development Corporation (RVCDC) with CDBG funds in the past to purchase and renovate older homes in West Medford. Through this program homes that are renovated are then sold to low-income households with a 20- year deed restriction of affordability. This year, the City warded RVCDC $63,000 of new CDBG funding and $98,800 in program income to purchase property to relocate several single family dwellings given to them by Southern Oregon University. RVCDC spent most of the past year trying to locate an affordable parcel of land to purchase to relocate these homes. On July 1, 2004, RVCDC closed on such a parcel with an existing unit on the land which they will rehabilitate and also sell to an applicant who is 80% of the median income or below.

**Activity 2:**  
The City awarded $112,827 of its 2003/04 CDBG funds and program income to the Housing Authority of Jackson County to provide loans to low-income homeowners to rehabilitate homes in need of repair. The types of rehabilitation include replacement of woodstoves and provision of emergency repairs for roofs, electrical, plumbing or heating systems, or other health or safety-related problems. During the 2003/04 program year, loans were made to 18 low-income households to provide for emergency repairs and rehabilitation.

The following table shows that a total of 105 household dwellings received emergency home repair funds allowing the homeowner to stay in his/her home.

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td># of Units</td>
<td>30</td>
<td>34</td>
<td>23</td>
<td>18</td>
</tr>
</tbody>
</table>
Activity 3:
The ACCESS Weatherization Program performed weatherization measures, including insulation, weather stripping, duct, repair, etc., on 81 eligible household dwellings located in the City of Medford during 2003/2004.

Strategy 2-2. Support home ownership through down payment and home ownership assistance. (C)

Activity 1:
The Housing Authority of Jackson County has been allocated 5 IDAs a year over a three year period to use for its clientele. HAJC is a member of Valley Individualized Development Accounts (VIDA) which includes nine other member agencies in the Willamette Valley and Southern Oregon. IDAs function as matched savings accounts that low-income people use to help them invest in homeownership, higher education and job training, or small business start-up.

Activity 2:
The Housing Authority of Jackson County administers a Homeownership Voucher Program using five of its Housing Choice vouchers to pay for mortgage payments for five selected clients who have gone through a special program and are involved in the Family Self-Sufficiency Program.

Activity 3:
The City of Medford established its own First Time Homebuyer Assistance Program, using $70,000 of CDBG funds, in 2003/2004. The program is administered by the Southern Oregon Housing Resource Center, through ACCESS, Inc. Funding is available for down payment and closing costs. Since the program’s inception in May 2004, there have been 95 calls about the program. Twenty-one persons attended the ABCs of Homebuying class and have identified Medford as the city where they are interested in purchasing their first home. This class is a prerequisite to receiving homebuyer assistance funds. Of those 21 persons, 15 were income qualified to receive assistance. By July 1, 2004, no one had completed an application to move forward to use this funding. The main problems are twofold:
1. Debt to income ratios are too high
2. Eligible borrowers are qualifying for loan amounts that much lower than the media purchase price. Income is too low and purchase prices are too high. Borrowers are qualifying for between $110,000 and $160,000 and the media housing price is between $169,900 in West Medford and $217,500 in East Medford.

The Housing and Community Development increased the amount available per family for assistance and is hoping that the increased amount will open the door to homeownership for interested, income qualifying families.

Activity 4:
ACCESS, Inc., together with local lenders, realtors and other housing related professionals, conducts homeowner education classes - the ABC's of Homebuying. The
curriculum was developed by the Homeowner Education Collaborative of Oregon as a means of standardizing education classes statewide. It is designed for use in community programs that encourage collaboration among education providers, community partners, and stakeholders in the home-buying education classes, thereby increasing the number of first-time and low-and-moderate income homebuyers. Classes are conducted in both English and Spanish. During the 2003/2004 program year, ACCESS reported that 50 Medford residents attended these classes.

**Activity 5:**
The West Medford Community Coalition, a local nonprofit, in partnership with the City of Medford, sponsored a Homebuyers Fair in March 2004. Many local lenders, realtors and credit counselors sponsored booths with information for first-time homebuyers. Approximately 200 people attended this event.

**Strategy 2-3. Support home ownership through self-help and sweat-equity programs. (B)**

**Activity 1:**
Habitat for Humanity is active in Medford building housing for low-income families using donated materials and labor. This type of approach can significantly reduce the costs of housing, putting home ownership within reach of low-income families. The City encourages this approach as one alternative to building affordable housing. Habitat for Humanity did not complete any houses in Medford during the 2003/04 program year. They publicized their need for land to build upon in Medford, but received no offers.

**Strategy 2-5. Encourage the development of affordable housing by private developers. (C)**

**Activity 1:**
The City of Medford, in cooperation with the Medford Urban Renewal District, applied to the State of Oregon and received a Vertical Housing Development Zone designation for the downtown area. This approval allows for applications to be filed for Vertical Housing Development Project Certifications. Projects approved and certified will be eligible to receive a 20 percent partial property tax exemption for each floor of residential use above a floor(s) of commercial use. The partial property tax exemption is limited to not more than 80% of the ad valorem value of the property and improvements. This will help to increase the number of residential units in the central business district.

**Activity 2:**
The Housing and Community Development Commission is investigating current planning tools and systems development charges to explore ways to assist developers who are interested in building affordable housing. They recommended that the bancrofting of System Development Charges be extended over a 20-year period if desired rather than a 10-year period. That change has been implemented.
Goal 3: To Affirmatively Further Fair Housing.

Strategy 3-1. Assure that federal laws prohibiting housing discrimination are publicized, and that allegations of discrimination are referred to the responsible enforcement agency. (B)

Activity 1:
City staff contacted the Fair Housing Council of Oregon to obtain brochures to be distributed and posters to be displayed in City Hall. These brochures have always been available at the Planning Department front counter, and posters have been displayed identifying whom to contact concerning allegations of housing discrimination. The Fair Housing Council of Oregon allowed the City of Medford to use their new large freestanding display chronicling the history of racism and fair housing efforts in Oregon. It was prominently displayed at City Hall during July 2003 for three weeks.

Activity 2:
The City of Medford sponsored a booth at the March Homebuyer Fair which attracted approximately 200 people. Over 150 fair housing brochures were distributed at this event.

Activity 3:
A fair housing display board was developed and used as part of the City of Medford’s CDBG 30th Anniversary Celebration held in April. This event was open to the public and approximately 35 people attended.

Activity 4:
The City of Medford ran an advertisement in the City newsletter, which is distributed in the water bill in July 2003. This newsletter is received by 23,000 people.

Strategy 3-2. Provide financial support to agencies providing legal assistance to low-income households. (A)

Activity 1:
The City of Medford provided $33,140 of General Funds to the Center for NonProfit Legal Services to provide legal services to low-income residents. Legal assistance was provided to 223 low-income residents of Medford during the 2003/04-program year. These services include legal services to households alleging fair housing law violations.

COMMUNITY DEVELOPMENT

Goal 4: To Identify and Enhance Neighborhood Assets.

Strategy 4-1. Encourage the development of Neighborhood Associations. (C)

One of the City Council goals is to maintain healthy neighborhoods and to revitalize challenged neighborhoods. The Neighborhood Resource Coordinator has been working to revitalize the Liberty Park (Beatty-Manzanita) neighborhood for the past three years.
The Liberty Park Neighborhood Association is working to implement the Action Plan. Activities this past year included the following:

- Neighborhood Street Tree planting in January 2004
- Cleanup Day on May 1, 2004
- A small pocket park was created on the Salvation Army property for use by residents.
- Planning efforts were stepped up to create a one acre neighborhood park in Liberty Park. Funding from Medford Urban Renewal Agency has been authorized for land acquisition and park development.

A second neighborhood revitalization effort in a neighborhood located around the McLoughlin Middle School and Jackson Elementary School was initiated in May 2004. Agency and school stakeholders met to begin the effort. A SWOT (Strengths, Weaknesses, Opportunities and Threats) was completed by participants. A survey was developed and volunteers started taking the survey door-to-door in June 2004. The surveys were completed in August and a second Neighborhood Association is being established. This group will develop a Neighborhood Action Plan.

**Strategy 4-2: Provide grants to Neighborhood Associations to enhance existing neighborhood assets. (B)**

**Activity 1:**
The Neighborhood Resource Division funded one Neighborhood Matching Grant to the Liberty Park Neighborhood Association for a Neighborhood Cleanup Day, which was held in May 2004. This was a partnership effort between the neighborhood group, the West Medford Community Coalition, the Salvation Army and the City of Medford.

The following items were collected during the one-day event:

- 4 30 yard dumpsters of household garbage
- 35 appliances
- 25 tires

Alleys were cleaned and volunteers went to homes of disabled and elderly residents to bring their items to the dump site.

**Activity 2:**
A second matching grant was given to the residents on Fairmount Street in the McLoughlin Neighborhood for a Neighborhood Street Tree Partnership planting project. Eight trees were planted in this all volunteer effort.

**Goal 5: To Support Public Service Agencies Providing Safety Net Services.**

**Strategy 5-1. Continue to provide operating grants to public service agencies serving low-income families, homeless, and persons with special needs. (A)**

The City allocated $100,000 of its 2003/04 CDBG funds to provide operating grants to
The following chart shows a summary of the number of persons assisted through the City’s public service activities using CDBG funds:

<table>
<thead>
<tr>
<th>Program</th>
<th># of Persons Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior services- food boxes</td>
<td>198</td>
</tr>
<tr>
<td>Children’s health care services</td>
<td>120</td>
</tr>
<tr>
<td>Child abuse services</td>
<td>40</td>
</tr>
<tr>
<td>Health center services</td>
<td>1,556</td>
</tr>
<tr>
<td>Total Persons Served with CDBG funds</td>
<td>1,914 persons</td>
</tr>
</tbody>
</table>

**Activity 1:**
The City awarded $16,400 of its 2003/04 CDBG funds to the Children’s Advocacy Center which provides for the coordination of child abuse programs in Medford. This funding served 40 Medford children.

**Activity 2:**
The City awarded $38,600 of its 2003/04 CDBG funds to the Community Health Center, which provided low cost medical services to 1,556 people in Medford. The recipients of this service are all income verified by the organization using the Part V definition.

**Activity 3:**
The City awarded $35,000 to Kids Health Connection to provide medical and dental services to 120 children through three elementary schools in West Medford. The children receiving this service are income verified by Kids Health Connection using the Part V definition.

**Activity 4:**
The City awarded $10,000 to the Salvation Army to provide food boxes to 198 senior citizens.

**Strategy 5-2** Continue to consider grant requests from public service agencies for capital expenses. (A)

**Goal 6:** To Upgrade Infrastructure in Low-Income Areas.

Strategy 6-2. Improve 1800 feet of oil-mat surface streets to City standards over the next five years. (A)

**Activity 1:**
The City bid out the street improvement project on Summit Avenue from Mary Place to Clark Street but the bids came in over budget. The Public Works Department combined the bidding on two CDBG projects for street improvement and sidewalk construction. One project was on Summit Street across from Jackson Elementary School.
from Mary Place to Clark Street, which involved 433 ft of street improvement with curb gutter and storm drains. The second project was on Prune Street from Columbus to Plum, which involved 600 ft of street with curb and gutter and storm drains. Both projects were completed by January 2004.

This project will bring the total amount of street improved up to 1,978 feet.

**Strategy 6-3. Replace hazardous sidewalks in low-income neighborhoods as necessary. (A)**

**Activity 1:**
The City has replaced 1,363 feet of hazardous sidewalk in low-income neighborhoods over the past 3 years. No hazardous sidewalk was replaced using CDBG funds in 2003/2003.

**Strategy 6-4. Construct 10,000 lineal feet of new sidewalks in low-income neighborhoods where no sidewalks currently exist over the next five years. (A)**

**Activity 1:**
The City’s Public Works Department bid the Plum Street project jointly with Summit Avenue. Summit Street included 324 lineal feet of sidewalk and Prune Street, 1,172 lineal feet. Both projects were completed by January 2004. The Prune Street sidewalk/street improvement project is Phase 1 of a larger project of building sidewalks around Union Park and Washington Elementary School. This sidewalk project brought the total amount of new sidewalk constructed to 7,705 lineal feet.

**Strategy 6.5 Install 20 new streetlights in low-income neighborhoods over the next five years. (A)**

**Activity 1:**
There were two street lights installed on the Summit Street project and four street lights were installed on Prune Street. The City has installed 20 new streetlights in low-income neighborhoods over the past four years with CDBG funds.

**Goal 7: To Improve Recreational Facilities in Low-Income Areas.**

**Strategy 7-5. Install a sidewalk on the west side of Union Park. (A)**

**Activity 1:**
The City completed the first phase of this sidewalk construction project by completing sidewalks on Prune Street which runs up to the Park from Columbus to Plum. The City will use Section 108 loan funding to construct new sidewalks, including curb and gutter, storm drains, street lights and street trees on Plum Street from Prune to Dakota which fronts Union Park in 2004/2005.
Goal 8:  To Improve the Appearance of Neighborhoods.

Activity 1:
The City’s Code Compliance Coordinator responded to complaints and concerns regarding trash and junk accumulation, substandard housing, abandoned vehicles and graffiti in the City’s CDBG eligible neighborhoods in 2003/2004. He concentrated his efforts in areas where such enforcement together with public or private improvements, rehabilitation and services are being provided to arrest further deterioration of those neighborhoods.

The following table shows the Code Enforcement activity in program year 2003/04:

<table>
<thead>
<tr>
<th>Total Number of Complaints</th>
<th>Total Number of Follow-ups</th>
<th>Total Number of Complaints Abated</th>
</tr>
</thead>
<tbody>
<tr>
<td>335</td>
<td>379</td>
<td>308</td>
</tr>
</tbody>
</table>

Strategy 8-1. Install 10 street trees per year in low-income neighborhoods. (A)

Activity 1:
The City planted one tree as part of the sidewalk construction project on Prune Street from Columbus to Plum. Parking strips have been constructed and the neighbors plan to plant additional trees in fall 2004.

Activity 2:
The City of Medford expended $2,972.00 of its 2001/2002 CDBG funding to purchase and install street trees in low-income neighborhoods. A section of the Liberty Park neighborhood around the Pine and Maple Streets was selected. Thirty neighborhood residents and volunteers from the West Medford Community Coalition came together in January 2004 to plant 18 trees.

The City has planted 43 street trees in low-income neighborhoods over the past four years using CDBG funds.

Activity 3:
The City used general funds through its Neighborhood Matching Grant program to fund the planting of eight street trees on Fairmount Street in West Medford. Neighbors organized the tree planting project with the actual planting taking place in February 2004.

Goal 10: To Reduce Lead-based Paint Hazards.

Strategy 10-1. Arrange training for agencies providing housing rehabilitation to bring their programs into compliance with the new Federal regulations concerning lead-based paint hazards. (A)
Activity 1:
The Housing Authority of Jackson County arranged two Lead Safe Work Practices Trainings for Contractors. A Neighborhood Resource staff member attended the second training, sponsored by MasiMax in May 2004. The Housing Authority has a certified lead based paint risk assessor and inspector on staff. The City of Medford keeps a list of all certified lead-based paint risk assessors and inspectors in Southern Oregon on file.

HOMELESSNESS

Strategy 11-1. Provide assistance to non-profit organizations that assist the homeless and help prevent homelessness. (A)

There were no CDBG funds expended during program year 2003/2004 to nonprofits to directly assist the homeless. The City used general fund dollars to support Hope House Emergency Shelter and for other programs to assist the homeless and prevent homelessness.

Activity 1:
As the Community Action Agency of Jackson County, Oregon, ACCESS, Inc. offers rental subsidy programs and refundable security deposit assistance through various funds including HOME that all help to prevent homelessness. During the 2003/2004 program year, 287 households/861 individuals received assistance with security deposits, 19 households/57 individuals received emergency assistance, and 28 households/84 individuals received rental/mortgage stabilization in the City of Medford.

Additional Activities:

Presently, Medford is served by several non-profit organizations which provide for the emergency shelter needs of homeless adults, yet there is still an identified need throughout the City for transitional housing and services for various populations who may be threatened with becoming homeless. Populations with particular needs include the elderly, victims of domestic violence, and youth.

ACCESS offers rental subsidy programs with priority given to the elderly, persons with disabilities, and households paying more than 50% of their gross income toward housing costs. ACCESS also provides a Senior/Disabled Outreach program, which receives City general funds, to address the issues of this population in meeting their basic daily survival needs. By coordinating closely with Senior and Disabled Services, which is another program funded with City general fund dollars, as well as with local hospitals, and other agencies working with seniors and persons with disabilities, ACCESS Outreach Coordinators are able to provide information and resources to assist this population in remaining safe and secure in their own homes, as well as providing options to other living situations. In 2003/2004, ACCESS was able to provide rental subsidy assistance to 13 elderly/disabled households or 20 individuals.
The Housing Authority of Jackson County coordinates the Family Self Sufficiency program, which is a voluntary program for those who receive the Housing Authority’s rental assistance. The program strives to break the welfare cycle and move recipients from welfare to work, ultimately promoting self-sufficiency and preventing homelessness.

In addition to Interfaith Care Community, Community Works, the Housing Authority, and ACCESS Inc.’s programs for the homeless, the Salvation Army, Medford Gospel Mission, Saint Vincent De Paul, Rogue Valley Addictions Recovery Center, and Jackson County Mental Health provide shelter and services for the homeless.

PERSONS WITH SPECIAL NEEDS

Goal: 12  To Increase the Supply of Transitional Housing for Persons with Special Needs.

The City expended its CDBG dollars to serve special needs persons by providing funding to the following housing projects:

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Type of Project</th>
<th># of Special Needs Persons Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lions Cottage</td>
<td>Permanent supportive housing</td>
<td>4</td>
</tr>
<tr>
<td>Christian’s Place ( rehabbed by RVCDC for using CDBG funds)</td>
<td>Transitional housing</td>
<td>4</td>
</tr>
<tr>
<td>Catalpa Shade</td>
<td>Permanent supportive housing</td>
<td>21 ( completed in 2003)</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>36</td>
</tr>
</tbody>
</table>

Strategy 12-1. Encourage development of transitional housing by non-profits. (B)

Transitional housing continues to be a need. Interfaith Care Community operates five transitional housing units; four in Medford and one in Ashland. They include the following:

- St. Mark’s House in partnership with St. Mark’s Episcopal Church serving families
- Zion House in partnership with Zion Lutheran Church serving single men
- Paul’s House in partnership with the Veteran’s Administration serving single male veterans
- Christian’s House serving people with disabilities
- Ruth’s House serving single women

Two more houses are in the planning stage for Medford; one that will serve women and veteran women and one serving men coming out of prison.
The Salvation Army has 43 transitional housing beds at Hope House and has expansion plans for 8 new family housing units to be built by 2007. Each family housing unit will have an average occupancy of 3, so 24 new beds will be added. ACCESS, Inc operates Wyatt House, which has five adult beds. They are planning a second house on Ross Lane in Medford which will have 4 beds. This development should be completed in spring 2005.

**Goal 13:** To Increase the Supply of Supportive Housing.

**Strategy 13-1.** Encourage housing development organizations and social service organizations to continue to develop supportive housing for low-income special needs populations. (A)

**Activity 1:**
The City awarded Accessible Space, Inc. of Jackson County, in partnership with ACCESS, Inc., $70,000 of its 2001/02 CDBG funds to assist in relocation and clearance for construction of a 22-unit apartment dwelling on Merriman Road for persons with mobility impairment, physical disability, and/or brain injury. The Catalpa Shade Project was completed in November 2003. It is fully leased with 21 special needs persons with traumatic brain injuries and/or mobility problems.

**Activity 2:**
The Housing Authority of Jackson County offers 150 mainstream vouchers to disabled persons seeking housing assistance. All 150 vouchers were used during the past year.

**COORDINATION**

**Goal 16:** To Provide Institutional Structure and Intergovernmental Cooperation.

**Strategy 16-1.** The City will consider creating a Housing and Community Development Commission. (A)

**Activity 1:**
A Housing Commission was established by the City Council in August 2002 and nine members were appointed in December 2002. The Commission serves in an advisory capacity to Council on issues related to affordable housing in the City of Medford. In the past program year, its function was increased to include an advisory role in regards to the City’s CDBG Entitlement. The Commission is now known as the Housing and Community Development Commission. The Commission has been working closely with City staff and a consultant to develop the new 2005-2009 Consolidated Plan.

**Strategy 16-2.** The City will consider providing additional Housing and Community Development staff. (A)
Activity 1:
The City has established a Neighborhood Resource Division under its City Manager’s Office. There are three staff persons including the Neighborhood Resource Coordinator who is responsible for the overall management of the division, a Grants Specialist, who is responsible for overall administration of CDBG, and a Code Compliance Coordinator. The City also contracted with the University of Oregon for the services of a RARE member to serve as an Assistant Community Development Coordinator.

ANTI-POVERTY
Goal 17: To Reduce the Number of People Living in Poverty in the City of Medford.

Strategy 17-1. To create and retain family wage jobs. (C)

Activity 1:
The City’s Economic Development Coordinator is working to implement the City Council’s Economic Development Strategy with a focus on family wage jobs. In partnership with other state and local business development organizations, the City has been involved in the creation and retention of 500 jobs over the past year.

II. Affirmatively Further Fair Housing

The Seattle office of the Fair Housing Commission reported on one case of discrimination related to disability during 2003/2004. A consultant is putting the final touches on the City’s Analysis of Impediments to Fair Housing. The new document will be available October 2004.

The City of Medford continues to educate its citizens on fair housing law through a variety of venues. An hour-long television show on the community access channel was taped in late June 2003 focusing on Fair Housing issues. It has aired a minimum of ten times on the community television station. In July, the Fair Housing Council’s three-dimensional display board depicting the history of housing discrimination in Oregon was available in a public location for two weeks within the City.

The Consumer Credit Counseling Service of Southern Oregon offers counseling to its clientele on fair housing issues. Counselors review with clients the protections various laws and regulations provide the consumer. This includes Fair Debt Collections Practices Act, Fair Credit billing, Fair Credit Reporting, and Fair Lending. They also counsel clients and present educational opportunities in the area of predatory lending.

In addition, ACCESS is certified by HUD as a Housing Counseling Agency to provide pre/post purchase counseling, default delinquency counseling and reverse mortgage counseling.
The City will be providing $33,140 of general fund dollars for the 2004/05 to the Center for Nonprofit Legal Services to allow them to continue to provide legal assistance on landlord-tenant law and on Fair Housing issues.

In the City’s current Analysis of Impediments, the following actions were listed for the City to address:

1. **Support a Fair Housing education and outreach program.** The City of Medford has Fair Housing posters posted throughout City Hall and has Fair Housing brochures in all of the City’s brochure racks as well as in the Jackson County Library’s racks. Staff has put together an ad on fair housing in Spanish and English that was published in the July 2003 citywide newsletter that was distributed to 23,000 households. Another such ad will be run in the July 2004 edition.

2. **Continue to support actions to increase the availability of affordable housing.** The City of Medford has established a Housing and Community Development Commission to explore and develop strategies to increase affordable housing. The City also continues to fund nonprofit housing agencies in their efforts to develop more affordable housing for low-income persons and for persons with special needs.

3. **Support the activities of the Fair Housing Council of Oregon (FHCO).** The City has been working closely with the FHCO to offer educational workshops and to provide information to the public about housing discrimination and fairness issues. Over the past year, the FHCO received 3 complaints from Medford. The complaint breakdown was as follows: 2 related to disability and the complaint was dropped and a third related to disability and race and a reasonable accommodation was granted and the case closed.

4. **Continue to support the inclusion of group homes and residential care facilities in the community.** Group homes and assisted care facilities continue to be constructed within the City. Increasing education about these facilities has made a difference in controlling NIMBY reactions. There are many model projects that can be pointed to with pride when an organization is interested in building a new facility.

5. **Include persons of protected classes on boards and commissions.** The City of Medford has a Multicultural Commission, which looks at the makeup of the City’s boards and commissions and its employees and works to develop strategies to ensure the inclusion of persons of protected classes.

6. **Monitor loan activities of lending institutions.** The City of Medford has contracted with a consultant to obtain data from lending institutions according to the Home Mortgage Disclosure Act (HMDA) and to analyze the differences in loan approval rates. This study was completed June 30, 2003.

The City of Medford partnered with the Consumer Credit Counseling Service of Southern Oregon to offer a Predatory Lending Roundtable, which was held April 14, 2003. Predatory lending has become an increasing problem in the area with the increasing number of senior citizens and Hispanics who are both highly vulnerable populations. Twenty persons representing conventional and sub-prime lenders, real estate brokers,
ACCESS, Housing Authority, Center for Nonprofit Legal Services, AARP, Senior Protective Services, USDA Rural Development and the West Medford Community Coalition participated. Forum participants learned about various predatory practices and shared experiences. They then developed strategies to address the problem, which focused primarily on education. The participants plan to meet again to follow up on the development of a local education and marketing plan on predatory lending.

There exists a housing shortage for farm worker housing for those workers who are migrants who come into the area to help with the harvest. The Housing Authority of Jackson County hopes to address that shortage through its Lilac Meadow development, which will provide 40 family units of migrant farm worker housing. Twenty units of the proposed 80 units of housing are intended to be set aside for temporary housing for migrant farm workers and another 20 units are to be set aside for permanent housing for farm workers. The project is currently under construction with a completion date of October 2004.

**III. Affordable Housing**

The City of Medford provides funding and supports the efforts of non-profit agencies that provide affordable housing in Medford. The Housing Authority of Jackson County provides Housing Choice vouchers and manages public housing units for low-income residents. The Housing Authority will continue to apply to HUD for additional Housing Choice vouchers and certificates to decrease the long waiting list of families desiring rental assistance as it has in previous years. The number of units provided is dependent upon Congressional funding and HUD allocations. In addition, CDBG funds were provided to the Housing Authority to provide loans for emergency repairs to 18 low/moderate-income households. The intent of these programs is to help existing homeowners maintain their homes, so that they can remain in them.

The following table indicates the number of households assisted with housing by income categories, and by renter and owner.

<table>
<thead>
<tr>
<th>Program</th>
<th>Extremely low-income Owners</th>
<th>Extremely low-income Renters</th>
<th>Low-income Owners</th>
<th>Low-income Renters</th>
<th>Moderate-income Owners</th>
<th>Moderate-income Renters</th>
</tr>
</thead>
<tbody>
<tr>
<td>HAJC Homeowner Emergency Repair</td>
<td>3</td>
<td>0</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Housing Authority’s Royal Apartments</td>
<td>0</td>
<td>26</td>
<td>0</td>
<td>35</td>
<td>0</td>
<td>25</td>
</tr>
<tr>
<td>Catalpa Shade</td>
<td>15</td>
<td></td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Catalpa Shade project, sponsored by Accessible Space, Inc, in partnership with ACCESS, Inc supports housing for 21 mobility impaired/brain injury residents. There
are 119 people on the waiting lists. It is currently developing its Woodrow Pines project to provide 8 units of affordable housing for chronically mentally ill persons.

The Southern Oregon Housing Resource Center has appointed an advisory board and has received its funding for the coming year from the State of Oregon. It will be identifying and evaluating regional housing needs. Between July 1, 2003 and June 30, 2004, 1842 persons have contacted the center for general housing counseling and assistance. The Housing Resource Center reported that 218 persons received mortgage delinquency counseling, 263 received counseling in home equity borrowing and 527 received some form of rental housing assistance.

The following chart shows the progress since 2000 in the development of affordable housing:

<table>
<thead>
<tr>
<th>Project Name</th>
<th># of Units Developed</th>
<th>Type of housing</th>
<th>Year completed</th>
<th>Income level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lions Cottage (ACCESS)</td>
<td>4</td>
<td>Disabled/elderly apartments</td>
<td>2002</td>
<td>50% median income</td>
</tr>
<tr>
<td>Four Oaks (ACCESS)</td>
<td>7</td>
<td>Low income apartments</td>
<td>2000</td>
<td>50% median income</td>
</tr>
<tr>
<td>Habitat for Humanity</td>
<td>2</td>
<td>Single family housing for low income</td>
<td>2001 and 2002</td>
<td>30% median income</td>
</tr>
<tr>
<td>Stevens Place (On Track)</td>
<td>50</td>
<td>Low income apts.-24 set aside for families unable to meet tenancy requirements under normal criteria</td>
<td>2000</td>
<td>50% median income</td>
</tr>
<tr>
<td>RVCDC</td>
<td>8</td>
<td>Single family housing for low income</td>
<td>Between 1999 and 2003</td>
<td>80% median income</td>
</tr>
<tr>
<td>HAJC-Lilac Meadow</td>
<td>42</td>
<td>Low income apartments</td>
<td>2003/2004</td>
<td>50% of median income and below</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>113 units</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**IV. Continuum of Care Narrative**

The lead entity for the Continuum of Care is the Jackson County Homeless Task Force (HTF), a Sub-Committee of the Jackson County Community Services Consortium (CSC). The CSC is currently made up of 37 member organizations and agencies. In 1989, the CSC started the Homelessness & Housing Project to address issues facing homeless citizens and in 1990 held an affordable housing community forum. As a result of the community forum, a plan was designed to coordinate efforts addressing on-going issues of homelessness. This group developed an Annual Homeless Survey to collect homeless data. The HTF continues to use that tool to collect data today. In 1995, the strategic plan of Senior Disability Services (SDS) of Rogue Valley
Council of Governments (RVCOG) identified accessible, affordable housing for people with disabilities as the number one priority.

As a result, the Accessible Affordable Housing Work Group was formed to address the issue in 1996. The group began efforts to create permanent housing for very low-income people with disabilities in Medford and surrounding areas.

A community-wide survey of people with disabilities, carried out in 1999, identified housing needs and preferences for the population. In 2001, the Homelessness & Housing Project combined with the Accessible Affordable Housing Workgroup to form the Jackson County Homeless Task Force (HTF). As the lead entity supporting the primary CoC planning group, the HTF has a Core Group (Sub-Committee) that initiates and schedules Continuum of Care Community planning meetings for Jackson County agencies, oversees mainstream resource utilization, and coordination of discharge planning that assist homeless persons. Additionally, in an effort to coordinate CoC planning at the local level with statewide planning efforts, a member of the HTF Core Group, ACCESS, Inc., participates in the statewide planning meetings of the Rural Oregon Continuum of Care Committee (ROCC). Finally, the HTF Core Group coordinates the collection and compilation of information on the local homeless population including the annual Gaps Analysis, Homeless Survey, 24-hour Homeless Count, and One Night Shelter Count. The group promotes community planning and development of future applications with a highly coordinated and objective ranking and review process in place.

The planning process - The primary planning group for the Jackson County CoC is the Jackson County Homeless Task Force. The HTF is comprised of 29 public and private organizations that provide services in Jackson County. HTF members work together to refine community planning processes and implement CoC systems that are both comprehensive and inclusive. The HTF meets monthly. The Task Force has sub-committees and a Core Work Group that also meet regularly as follows: Homeless Youth Sub-Committee, Accessible Affordable Housing Sub-Committee, HTF Core Working Group. The Sub-Committees meet to:

- Identify and coordinate mainstream resources and avoid duplication
- Work cooperatively to fill gaps to decrease chronic homelessness
- Support each agency's efforts - one means is through implementation and collaboration of HMIS
- Plan coordinate and collaborate emergency, transitional and permanent housing strategies to maximize services
- Coordinate discharge planning
- Coordinate and develop parallel intake procedures eventually developing a client universal intake
- Conduct the prioritization process for HUD McKinney/Vento and cooperatively write Exhibit 1.

The subcommittees are: Homeless Youth, Accessible Affordable Housing, and Core Work Group. An additional subcommittee, the Annual Homeless Count carries out its functions as a part of the regular operations of the Homeless Task Force. The role of each of the subcommittees is described below including the five-year strategies.

**HOMELESS YOUTH SUBCOMMITTEE**
This subcommittee meets year-round on issues specific to homeless youth, including coordination and sharing of information between organizations that provide services to homeless youth. Members of this subcommittee include representatives from organizations that serve homeless
youth in Jackson County including but not limited to non-profits, Jackson County, School Districts, Juvenile Corrections, Services to Children & Families, DHS Self Sufficiency, homeless or formerly homeless youth, and others.

**Five Year Strategies:**

i. Maintain the Youth Transitional Housing services available through the current grants.

ii. Identify and increase access to mainstream resource while developing additional resources for homeless youth under the age of 16.

iii. Continue to operate Drop-in Center in Medford for youth that are homeless, runaway, or at risk

   1. and are between the ages of 11-22, to include: medical assistance, case management, advocacy,
   2. counseling, referrals, other services


v. Increase prevention services for youth and families at risk of homelessness.

**ACCESSIBLE AFFORDABLE HOUSING SUBCOMMITTEE**

This subcommittee meets year-round on issues specific to homeless persons with disabilities and homeless seniors. The term "Persons with disabilities" shall be as inclusive as possible, including mental and physical disabilities, seriously mentally ill, developmental disabilities, persons with HIV/AIDS and other disabling conditions. Members of this subcommittee include representatives from organizations that provide services to homeless persons with disabilities and homeless seniors in Jackson County including but not limited to non-profits, Jackson County, VA Dom., RVCOG/SDS, DASIL, City of Medford, Jackson County Mental Health, Department of Social Security, homeless or formerly homeless, and others.

**Five-Year Strategies:**

1. Continue operation of the Home At Last permanent supportive housing project.

2. Continue operation of the 2nd Chance Renters Rehabilitation program for individuals with poor rental histories which provide:

   a. Intensive case management services which will include money management, mediation with landlords, skills training on how to get along with neighbors, keep your apartment clean, etc.
   b. Follow-up case management services, even after several years if required, in order for the person to maintain their housing.
   c. Clients receive a "Certificate of Completion" upon completion of the program.

3. Continue support of other affordable accessible housing projects in the community (e.g. VA’s Homeless Providers Grant/Per Diem Housing Program).

4. Hold annual "Affordable Housing Roundtable" to discuss solutions to gaps and issues, and share resources.

5. Create additional single room occupancy units.

**CORE WORK GROUP SUBCOMMITTEE**

The Core work group meets year-round monthly on issues specific to the HTF, including coordination and sharing of information between organizations that provide services to the homeless. Members of this subcommittee include representatives from the HTF and organizations that serve homeless persons in Jackson County including but not limited to non-profits, Jackson County HHS, DHS Child Welfare, DHS Self Sufficiency and the City of Medford.
**Five-Year Strategies:**
1) Refine homeless data collection process to establish baseline following action steps below.
2) Minimize the number of homeless people resulting from discharge from an institutional setting utilizing the CoC Discharge Planning Policy.
3) To strengthen Continuum of Care by maximizing access to current mainstream resources and finding new ongoing sources of funding

### a. Chronic Homelessness Strategy/Goals Chart

<table>
<thead>
<tr>
<th>Goal: End Chronic Homelessness (&quot;What&quot; are you trying to accomplish)</th>
<th>Action Steps (&quot;How&quot; are you to go about accomplishing it)</th>
<th>Responsible Person/Organization (&quot;Who&quot; is responsible for accomplishing it)</th>
<th>Target Dates (mo/yr will be accomplished)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex: Count unsheltered homeless to establish baseline</td>
<td>Annual street counts of unsheltered homeless persons</td>
<td>Emergency Shelter Commission</td>
<td>January 2005</td>
</tr>
<tr>
<td>Goal 1: Establish Baseline Figures for Homeless Populations</td>
<td>Refine Homeless Data Collection Process: 24-hour Count, GAPS Analysis, Homeless Survey, and One Night Shelter Count</td>
<td>HTF Core Group</td>
<td>November 2004</td>
</tr>
<tr>
<td>Goal 2: Maintain the number of beds for substance abuse treatment</td>
<td>Research alternative sources of funding. Prepare grants cooperatively. Apply for grants fund.</td>
<td>On-Track</td>
<td>On-going</td>
</tr>
<tr>
<td>Goal 3: Increase the number of Permanent Supportive Housing options available for people with disabling conditions.</td>
<td>Pursue CoC grants &amp; other resources. Develop PSHPD</td>
<td>CoC</td>
<td>January 2013</td>
</tr>
<tr>
<td>Goal 4: Enhance Street Outreach for Homeless</td>
<td>Develop strategy and explore funding alternatives. Implement steps. Reassign personnel</td>
<td>CoC</td>
<td>June 2005</td>
</tr>
</tbody>
</table>

### b. Other Homeless Goals Chart

<table>
<thead>
<tr>
<th>Goal: Other Homelessness</th>
<th>Action Steps</th>
<th>Responsible Person/Organization</th>
<th>Target Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal 1:</strong> Create emergency transitional shelter for youth ages 11-18</td>
<td>Conduct feasibility study. Develop timeline and action plan</td>
<td>HTF Homeless Youth Sub-Committee</td>
<td>January 2005</td>
</tr>
<tr>
<td><strong>Goal 2:</strong> Increase preventive services for youth &amp; families at risk of homelessness</td>
<td>Increase rental subsidy programs and support for case management</td>
<td>HTF Homeless Youth Sub-Committee</td>
<td>June 2005</td>
</tr>
<tr>
<td><strong>Goal 3:</strong> Create additional single room occupancy units</td>
<td>Conduct feasibility study</td>
<td>HTF Accessible Affordable Housing Sub-Committee</td>
<td>June 2005</td>
</tr>
</tbody>
</table>
During the 2003/04 program year, the following accomplishments occurred addressing the mission of the Task Force to eliminate homelessness and the root causes of homelessness:

- A major success in the Continuum this year is the fact that two organizations and agencies, 1) Salvation Army and 2) Interfaith Care Community in collaboration with DASIL, Set Free Ministries, and Connecting Point Ministries, were successful in obtaining funding and implementing two Grant Per Diem Programs in partnership with the U.S. Veterans Administration serving VETS ready to work, mentally ill, substance abuse, and women VETS with children.

- Affordable Housing Roundtable was started this year bringing organizations and agencies experienced in housing issues together to address barriers to affordable housing in our region.

- HART Program: The Hart Program through a 2002 CoC grant renewal request that was awarded by HUD, through its McKinney/Vento funding process is comprised of Sex Abuse Prevention and Education Outreach (Streetwise), Basic Center (Reunification Services) and the Transitional Living Program to offer comprehensive services to runaway, teen parents, and homeless youth. During 2004 through the HUD grant Community Works was able to assist 15 individuals, 7 families for a total of 33 served.

  → Community Works Transitional Living Program continues to serve homeless youth. During the past 12 months from February 1, 2003 to January 31, 2004, 104 teens avoided homelessness by receiving intake, assessment, referral, and case management services, another 33 teens received short-term care.

  → The Teen Drop in Center, Community Works’ StreetWise program, consolidated services into one drop-in center location and has made 681 contacts in the last year, and handed out 3027 drink items, 6185 hygiene items, and 3606 written materials.

  → Community Works Reunification Services provided 17 youth with emergency shelter.

- Woodrow Pines: 2002 CoC grant request was awarded by HUD, through its McKinney/Vento funding process, to provide 10 units of permanent supportive housing for persons with disabilities in Jackson County. This is a collaborative project including Jackson County Mental Health and ACCESS, Inc., the Community Action Agency for Jackson County, Oregon. The project has moved through the design stage and is currently out for bid.

- The Home at Last Program was funded in 2001 and successfully implemented. During FY04 40 adults and 7 children moved into housing.

- Second Chance Program Developed locally with short and long-term comprehensive case management designed to give those individuals and families needing housing a second chance. To date, 146 clients have enrolled and 30 have graduated with certificates.

- Homeless Day in the Park was organized by the Jackson County Homeless Task Force in October 2003.

- Three (3) homeless representatives on the Homeless Task Force moved into permanent housing.
The following chart summarizes the activities undertaken to implement the Continuum of Care Strategy in Jackson County:

<table>
<thead>
<tr>
<th>Program</th>
<th># of persons served</th>
<th>Type of person served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second Chance Renters Curriculum- DASIL</td>
<td>146 enrolled, 30 completed</td>
<td>Low Income- General People with disabilities</td>
</tr>
<tr>
<td>Transitional Living Program- Community Works (case management)</td>
<td>104</td>
<td>Youth ages 10-20</td>
</tr>
<tr>
<td>Transitional Living Program- Community Works – short term care</td>
<td>33</td>
<td>Youth – ages 10-20</td>
</tr>
<tr>
<td>Home At Last- moved into housing</td>
<td>40 adults, 7 children</td>
<td>Disabled and low income clients</td>
</tr>
</tbody>
</table>

A Continuum of Care gaps analysis was completed for Jackson County by ACCESS for 2004. The following table shows that where high priority unmet needs or gaps exist. There exists an increasing need for additional transitional housing and permanent supportive housing.

<table>
<thead>
<tr>
<th>Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Housing</td>
</tr>
<tr>
<td>Emergency Shelter</td>
</tr>
<tr>
<td>Transitional Housing</td>
</tr>
<tr>
<td>Permanent Supportive Housing</td>
</tr>
<tr>
<td>TOTAL</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Families with Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Housing</td>
</tr>
<tr>
<td>Emergency Shelter</td>
</tr>
<tr>
<td>Transitional Housing</td>
</tr>
<tr>
<td>Permanent Supportive Housing</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

V. Other Actions

1. Actions to address obstacles to serving the underserved – The primary obstacle to serving the underserved remains a lack of funding availability. In 2003/04, the eligible
requests for CDBG funds exceeded the amount available for capital improvements by $202,118. Requests for operating grants during the 2003/04 program year totaled $671,508 and only $100,000 was available from CDBG funds. In order to fill that need the City added $307,790 in general fund money to that which was available for serving underserved needs. The amount requested still exceeded the amount available by $263,718.

Some actions taken to serve the underserved needs of the City included providing for the needs of abused and low-income children. During the 2003/04 program year, the City provided funding to the Child Abuse Task Force, which provides a coordinating center for all child abuse programs in Medford. The City also provided CDBG funds for the Kids Health Connection providing health care and dental care for low income children at three elementary schools in West Medford. Funds were provided to the Salvation Army for food boxes for low-income senior citizens and to the Community Health Center which provides medical care to low-income households.

2. Foster and maintain affordable housing - The City of Medford provided funds to the Housing Authority of Jackson County to rehabilitate 86 units of low income rental units. If this funding had not been available, the Housing Authority was considering the sale of the Royal Apartments and the units might have no longer been affordable. The City of Medford also provided funds to the Housing Authority of Jackson County (HAJC) to fund their Homeowner Emergency Repair Program. This program provides no interest loans to low-income homeowners for emergency repairs to their homes. This helps to maintain the affordable housing stock in the City.

3. Eliminate barriers to affordable housing - One of the primary barriers to providing affordable housing is finding land that is inexpensive, properly zoned, and close to existing services. Often providing land that meets all of these needs requires that affordable housing be built in or close to existing neighborhoods where neighborhood resistance may exist. The City allows accessory dwelling units (ADUs) in conjunction with all existing single-family residences. While there has been resistance to this in some neighborhoods, the City continues to maintain this ordinance. The City now has in place a Vertical Housing Development Zone in its central business area to provide a tax incentive to create more affordable housing in the downtown.

4. Overcome gaps in institutional structures – Through its General Fund, the City of Medford provides operating grants, known as City Livability Grants to human service agencies providing services to low-income persons in the City. These funds are intended to fill gaps between the agencies’ funding needs and that which is provided by other funding sources. In 2003/04, the City provided $307,790 in operating grants from the general fund, and $100,000 in operating grants from the Community Development Block Grant fund. This provided a total of $407,790 in operating grants to 18 agencies providing social and health services primarily to low-income residents of Medford.

5. Public housing resident initiatives – The Housing Authority of Jackson County provides public housing. They are operating a Family Self-sufficiency Program. As part
of this, households are given incentives to try to gain self-sufficiency and are expected to try by the end of their contract period to be off of all public assistance. Those persons involved in this initiative are designated as the Housing Authority’s Resident Advisory Board. In program year 2003/04, the Self Sufficiency Program has initiated a home purchase option using five of their Housing Choice Vouchers to pay mortgage payments for five qualified Self Sufficiency Program participants.

6. Lead-based paint hazards – During the 2003/04 program year, the City continued to monitor sub-recipients for compliance with lead-based paint regulations. The Housing Authority of Jackson County offered a special lead safe practices training for the contractors working on the rehabilitation of the Royal Apartments.

7. Compliance and monitoring - The City of Medford is responsible for monitoring only those funds that it receives from HUD, which are limited to the Community Development Block Grant. The City has an overall HUD Grant Manager (Neighborhood Resource Coordinator) as well as a Grants Specialist (formerly the CDBG Coordinator) who are responsible for overseeing the use of CDBG funds. The Grants Specialist maintains a close working relationship with grant sub-recipients. Quarterly financial and beneficiary reports are required of all public service agencies receiving CDBG funds. Annual beneficiary reports are required of all recipients of capital grants. All capital projects are administered under procurement standards governed by OMB Circular A-110 for non-profits. Federal Labor Standards are adhered to for all capital projects as well.

In addition to reviewing all sub-recipient draw down requests, program and financial reports; the City completed a complete risk assessment of all of its 2003/04 CDBG sub-recipients. The purpose of this risk assessment was to identify which sub-recipients will require comprehensive monitoring during the program year. The risk assessment uses the following criteria to identify high-risk sub-recipients that will require comprehensive monitoring:

- sub-recipients new to CDBG program;
- sub-recipients that have experienced turnover in key staff positions;
- sub-recipients with previous compliance or performance problems;
- sub-recipients carrying out high-risk activities; and
- sub-recipients undertaking multiple CDBG activities for the first time.

Staff determined that monitoring of two sub-recipients would take place during this program year due to both sub-recipients being new to the CDBG program. Both agencies also received a comprehensive orientation in CDBG administration by City Staff before contracts were signed. City staff also had a monitoring visit with an existing CDBG sub-recipient to review income criteria for the population impacted.

The schedule of each on-site monitoring visit was determined by the sub-recipient project schedule and a standardized monitoring checklist was used when evaluating each sub-recipient CDBG-funded project. When either findings or concerns were found, staff followed up with the sub-recipient agency requiring them to take corrective action and
report back to the City within a predetermined time period. Any concerns and/or findings were addressed promptly by the sub-recipients in question.

8. Reduce the number of families in poverty – While the City does not have direct control over the household income of families, it is hoped that by funding programs that provide services to low-income families, it will reduce the number living in poverty-induced situations.

VI. Leveraging Resources

The City of Medford continues to leverage general fund dollars to supplement CDBG funds to meet the housing and neighborhood development needs of the community. In addition, the City considers the ability of sub-recipients to leverage other local, state, and federal funding to complete their projects or continue their programs when considering providing CDBG funds to them. All of this year’s subrecipients leveraged funds from sources outside the City to provide on-going programs and to complete their projects. In 2003/04, the City used $307,790 from the general fund to leverage $100,000 in operating grants from the Community Development Block Grant (CDBG) fund. Combined, these funds were used to supply $407,790 in operating grants to 18 agencies providing health and human services to low-income households and persons in the City.

The Housing and Community Development Commission is asking the City Council to consider adopting a similar leveraging mechanism to assist in the development of affordable housing. They would like to see the creation of an Affordable Housing Opportunity Fund to assist nonprofit housing developers.

VII. Citizen Comments

Notice of a 15-day public comment period was held for the Consolidated Annual Performance and Evaluation Report (CAPER) in September 2004. A public hearing was held on September 20, 2004. There were no comments.

VIII. Self-Evaluation

The overall goal of the City of Medford’s Consolidated Plan is to develop a viable community by providing decent housing and a suitable living environment and expanding economic opportunities principally for low and moderate income persons. Most activities are on schedule and our major goals are on target.

Performance Measurement System
The City of Medford has used a performance measurement system with its Public Service subrecipients for the past three years. Each subrecipient is required to complete a logic model with their grant application. They are required to report on their target outputs, actual outputs and percentage level of attainment of their outcomes. We are continuing
to work closely with our subrecipients to monitor their progress meeting their overall goals.

The City of Medford is in the process of developing a similar performance measurement system for our Code Compliance program to evaluate both the educational component and the response to violations.

Staff, working with a consultant, is in the process of developing a new Five Year Consolidated Plan where a performance measurement system will be put in place for all components of the City of Medford’s CDBG Entitlement.

**Timeliness**
The City of Medford’s timeliness standard was .98 times the FY 2003 grant of $758,000. During program year 2003/04, most of the City’s CDBG projects were on schedule. Funding that was reallocated to streetlights and street trees that had been carried over from 2001/02 was expended by January 2004. Funding for the Catalpa Shade project, developed by Accessible Space, Inc., has been expended and that project is complete and fully leased.

Two of the City’s sidewalk/street projects (Prune Street and Summit Avenue) are completed and the final check was drawn down in January 2004. The monitoring and implementation of internal City capital improvement projects through the Neighborhood Resource Division has led to greater efficiency in ensuring that those projects meet deadlines and are more cost effective.

**Barriers**
One barrier confronting the City’s sidewalk development program in low-income neighborhoods was that overall costs were high because the effort was done piecemeal. The amount of sidewalk per dollar spent was fairly minimal. To rectify this situation, the City is now bidding sidewalk projects in different sections of the City together as one project. This has provided cost savings in the Prune and Summit projects this past year. In the coming year, the City will use Section 108 loan funds so that more sidewalks can be constructed for less money.

Another barrier to the program’s efficiency involved the annual decision making process on the entitlement dollars. A Grants Subcommittee would meet a total of four times during the spring to review the applications and projects and then would make recommendations to the Budget Committee which made its recommendations to City Council. The Grant Subcommittee was not an ongoing committee, but met only in the spring of each year to determine the grants funding. Also the make-up of the subcommittee, which included 3 citizens and 3 City Council members changed annually. This past program year, the City expanded the role of the Housing and Community Development Commission to serve in this capacity. This provides for the involvement of 9 citizens in the decision-making process. The Commission meets monthly all year round and is better able to respond to issues that require citizen input throughout the year.
A major obstacle to the development of affordable housing in the City of Medford is the price and availability of land for development. Most of the available land is already owned by the larger developers who are not longer selling off pieces to smaller developers and/or nonprofit developers. A lot now goes for $100,000. Housing prices have skyrocketed over the past two years and continue to rise making purchasing homes to rehabilitate and resell not an economically viable option for organizations such as Rogue Valley CDC. The average housing price in July 2004 was $217,500 in East Medford and $169,900 in West Medford. The gap between income and housing prices continues to be one of the largest throughout the west coast. This has caused programs such as the First Time Homebuyer Assistance Program and Rogue Valley CDC’s rehabilitation program to experience difficulty in moving forward.

**Accountability**

Draw downs had been made on a regular basis. When a sub-recipient requests payment from CDBG, the sub-recipient is asked to submit a standardized voucher stating the total budget and expenditures to date with receipts to verify expense. Both the Neighborhood Resource Division and Finance Departments monitor this information to make certain that the sub-recipient’s records and the City’s records agree.

During the 2003/04 program year, 15% of the City’s entitlement was expended for administration. The City expended 12% of its entitlement for Public Services.

2. **Relationship of Use of CDBG Funds to Goals and Strategies of the Consolidated Plan**

The use of CDBG funds in program year 2003/04 addressed a number of the high priority needs outlined in the Consolidated Plan. A high priority need was addressed both through public service dollars of $38,600 for operating expenses for the Community Health Center. Over the past four years, the Community Health Center has been able to meet the medical needs of 9,780 persons with 13% of those being served representing minority populations.

Street and Sidewalk improvements are both rated high in the Consolidated Plan. At this time, the City has completed 7,705 of the 10,000 lineal feet of new sidewalk construction targeted or 77% of the total goal. It has completed 1,978 feet of oil mat surface streets out of the goal of 1800 feet or 110% of the goal.

The City has installed 20 new streetlights in low-income neighborhoods over the past four years with a goal of 20 streetlights over the five-year period. It has planted 43 street trees in a four-year period out of a goal of 10 street trees per year for the five-year period.

The Housing Authority of Jackson County used $112,827 of program income and CDBG funds during the 2003/04 program year to repair 18 households, which increased the number of homes receiving repairs to 105 over a four-year period. Maintaining existing
affordable housing by supporting rehabilitation programs is a high priority in the *Consolidated Plan*.

The Center for Nonprofit Legal Services received $33,140 in general fund dollars to serve 186 clients with legal issues related to domestic violence, fair housing and landlord tenant relations. This service, especially landlord-tenant issues, was ranked as a high priority. Over the past four years, the Center has served 1,105 persons with legal problems with 19% from minority populations.

The City of Medford has met its coordination goals as outlined in the *Consolidated Plan*. Creating the Neighborhood Resource Division to administer and monitor the City’s CDBG and Grants programs, Neighborhood Revitalization, Code Compliance and Housing programs has led to a concerted and coordinated effort to ensure that the needs of the City’s low income, special needs populations and homeless receive the services needed and that neighborhoods and housing are safe and sanitary.

- The City of Medford carried out the planned action described in its Action Plan. No activities were changed during program year 2003/04.

1) The City of Medford continues to leverage general fund money to supplement CDBG funds to meet the needs of the community. In addition, the City considers the ability of sub-recipients to leverage other local, state, and federal funding to complete their projects or continue their programs when considering providing funds to them. All of this year’s sub-recipients leveraged funds from sources outside the City to provide on-going programs and to complete their projects.

2) During the 2003/04 program year the City provided Certificates of Consistency with the Consolidated Plan for the following projects:

<table>
<thead>
<tr>
<th>Name of Applicant</th>
<th>Project Name</th>
<th>Location of Project</th>
<th>Program applied to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Authority of Jackson County</td>
<td>Public Housing Family Self-Sufficiency</td>
<td>Jackson County</td>
<td>Resident opportunities and supportive services</td>
</tr>
<tr>
<td>The Salvation Army</td>
<td>Hope House Transitional Shelter</td>
<td>1065 Crews Road Medford, OR</td>
<td>CoC-Homeless Assistance Project</td>
</tr>
<tr>
<td>Fair Housing Council of Oregon</td>
<td>Fair Housing Enforcement</td>
<td>Entire State of Oregon &amp; Clark County, WA</td>
<td>Fair Housing Initiatives Program (PEI)</td>
</tr>
<tr>
<td>Legal Aid Services of Oregon</td>
<td>Statewide Fair Housing Education and Outreach</td>
<td>Entire State of Oregon</td>
<td>Fair Housing Initiatives Program (EOI—GC)</td>
</tr>
<tr>
<td>Oregon Department of Human Services</td>
<td>Oregon Housing Opportunities in Partnership</td>
<td>31 County Area, Statewide, not including MSA</td>
<td>HOPWA</td>
</tr>
<tr>
<td>ACCESS, Inc</td>
<td>HUD Housing Counseling-Local Housing Counseling</td>
<td>3630 Aviation Way Medford, OR Jackson County</td>
<td>HUD Housing Counseling Program</td>
</tr>
</tbody>
</table>
3) There is no evidence that the City hindered Consolidated Plan implementation by action or willful inaction.

- All CDBG funds were used exclusively to meet one of the three national objectives. Specifically, all CDBG funds were used to benefit low/mod income residents of Medford. All infrastructure improvements were either completed within a Census Block Group which includes more than 51% low/mod income households according to the 2000 census or an income survey was completed which verified that at least 51% of the residents who will receive an area benefit from the use of CDBG funds are low/mod income.

Those programs which provide services to low/mod income clients are either based on a presumed benefit or the agency providing the benefit is required to maintain income verification for each of its clients and provide the City with data quarterly which indicates that at least 51% of its clients qualify as low/mod. Where children are the beneficiaries of services, no children who are considered wards-of-the-court are allowed to be counted as low/mod income clients.

- All homes rehabilitated through the Housing Authority’s emergency repair program were occupied during the repairs and no displacement occurred. All apartment units being renovated by the Housing Authority (Royal Apartments) were occupied during rehabilitation and no displacement occurred. The Catalpa Shade project included the demolition of one old house, located at 2642 1/2 Merriman Road, Medford, Oregon, and the relocation of one family. In accordance with section 104 (d) of the Housing and Community Development Act of 1974, as amended, the family received all appropriate notices, and was relocated into a decent, safe, and sanitary replacement home of their choice. A total payment of $32,420 was made to this family for tenant relocation expenses.

- CDBG funds were not used to fund economic development activities during the 2003/04 program year.