



Council Business Meeting

April 16, 2024

Agenda Item	Public Hearing CDBG Award and Action Plan Development	
From	Linda Reid	Housing Program Manager
Contact	Linda.reid@ashland.or.us 541-552-2043	
Item Type	Requested by Council <input type="checkbox"/> Update <input type="checkbox"/> Request for Direction <input type="checkbox"/> Presentation <input type="checkbox"/> Consent <input type="checkbox"/> Public Hearing <input checked="" type="checkbox"/> New Business <input checked="" type="checkbox"/> Old Business <input type="checkbox"/>	

SUMMARY

The City of Ashland is expecting a total of **\$179,575** in Community Development Block Grants (CDBG) for the 2024 Program Year. The City of Ashland will not receive final notification of the annual CDBG award amount from the Department of Housing and Urban Development until after awards have been made. The estimate is included to provide guidance to applicants regarding the expected amount of available funds. The City reserves the right to award more or less than this estimate depending on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

CDBG regulatory limits establish that 20% of the \$179,575 annual allocation may be earmarked for administrative costs, totaling **\$35,915**. After setting aside this amount for administration of the program, the remainder, which amounts to **\$143,660**, is available for competitive award to eligible capital projects. Additionally, a portion of this remainder, up to 15% of the total annual award or **\$26,936**, may be allocated toward public service projects.

POLICIES, PLANS & GOALS SUPPORTED

- 2020-2024 Consolidated Plan 5-year strategic plan for the use of community development block grant (cdbg) funds
 - https://www.ashland.or.us/Files/Con_Plan_Final_Adopted_Version.pdf

BACKGROUND AND ADDITIONAL INFORMATION

The City of Ashland has received one application for capital funding (the entire amount of funding less administrative costs are eligible for capital projects). The city received one application for public service funding (which can be 15% of the total allocation).

Organization	Proposed Project	CDBG Funds Requested	Goal	Consolidated Plan Goal
Maslow Project	Encourage stability, self-sufficiency, and school	\$18,000	Homeless Goals: Provide access to basic needs, information, and	Public service activities other than Low/Moderate Income Housing Benefit:





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	achievement for homeless youth. *Public Service		referral. Provide case management and housing to improve stability to approximately 100 identified homeless youth ages 0-24.	100 Persons Assisted Public service activities for Low/Moderate Income Housing Benefit: 50 Households Assisted
Sunstone Housing Collaborative	Affordable Housing Development intended for district staff and low to moderate income families with children. *Capital Project	\$143,660	Access to housing units that are affordable and suitable to low-, and moderate-income and special needs households. Approx. 92 units of housing anticipated to be created.	Rental Units Constructed: 15 Household Housing Units Homeowner Housing Rehabilitated: 15 Household Housing Units.

A total of **\$143,660** in regular CDBG funding is available to distribute to eligible recipients for projects meeting the CDBG national objectives, and which are consistent with the City of Ashland 5-year Consolidated Plan.

CDBG funds will be available upon approval of the 2024 Action Plan, and upon the completion of any regulatory requirements including but not limited to environmental review clearance. Upon completion of the Action Plan a public hearing for review and approval will be held before the Housing and Human Services Advisory Committee to ensure consistency with the awards designated by the City Council. The U.S. Department of Housing and Urban Development (HUD) must review the Annual Action Plan submitted by the City to ensure the activities funded are consistent with federal requirements, and with the local Consolidated Plan. The City will reserve the right to award more or less than this estimate dependent on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

ADVISORY COMMITTEE AND STAFF RECOMMENDATIONS

The Housing and Human Services Advisory Committee reviewed the applications and made a funding recommendation at their [regular meeting on March 28th](#). The Housing and Human Services Advisory Commission Recommendation is as follows:

- Award \$20,000 in CDBG funding to Maslow Project as a public service project and the remaining balance of funds, \$123,660, in a provisional award to Sunstone Housing Collaborative for a capital project.





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Staff reviewed the applications submitted and made a recommendation to award \$18,000 to Maslow Project, and the remaining balance of \$125,660 as a provisional award to Sunstone Housing Collaborative.

The recommendation for a “provisional award” to Sunstone Housing Collaborative anticipates that the organization will have until February 1, 2025, to identify a suitable capital project for the utilization of CDBG funding within the program year. Should Sunstone Housing Collaborative fail to designate an eligible use for the CDBG funding on their project within this timeframe, the funds will be subject to reallocation through the competitive award process in the 2025 CDBG program year. This provisional award arrangement allows Sunstone Housing Collaborative to advance their project design with the confidence of secured funding. Nevertheless, due to the necessity for the City to allocate CDBG funds in a timely manner, this stipulated period ensures that if the project does not progress expediently, the opportunity to re-award the funds is preserved, thereby optimizing the effective use of resources.

FISCAL IMPACTS

The funding awarded to Community Development Block Grant (CDBG) projects is sourced from allocations provided by the federal government, specifically the Department of Housing and Urban Development (HUD) and is incorporated into the annual budget. As the City undertakes the administration of the program, the awards are reimbursed by the Department of Housing and Urban Development. Consequently, this arrangement ensures there is no fiscal impact on the City, as all expenditures related to CDBG projects are fully covered through federal reimbursements.

SUGGESTED ACTIONS, MOTIONS and/or OPTIONS

I move to award the competitively available 2024 Community Development Block Grant funds as follows:

\$_____ to the Maslow Project Public Service Project; and

\$_____ in a provisional award to Sunstone Housing Collaborative.

Should the Council decide not to award all or part of the funding, the remainder would be incorporated into the next budget allocation process.

REFERENCES & ATTACHMENTS

Attachment 1: 2024 CDBG Applications All

Attachment 2: Staff Evaluation



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2024 Program Year Community Development Block Grant (CDBG)Application

These completed Sheets shall be included as the first pages on all submittals.

I. APPLICANT INFORMATION

Applicant Organization Name:

Maslow Project

Executive Director's Name(s): Mary Ferrell

Board Member Names (attach separate sheet)

Applicant Mailing Address: PO BOX 999 Medford, OR. 97504

Applicant Street Address: 500 Monroe Street, Medford, OR. 97504

IRS Classification: 501c3

Federal Tax ID#: 27-0734969

Mission Statement: (may be attached)

We empower homeless youth and families to engage and thrive independently in all aspects of life by providing supports that stabilize and strengthen resiliency.

Total Employees: 14

Total Volunteers: 45

II. CONTACT PERSON (designate a contact person who is familiar with the project)

Name: Mary Ferrell
Title: Executive Director
Phone Number: 541-608-6868
Fax Number: 541-608-6869
E-mail Address: Mary@maslowproject.com

III. PROJECT INFORMATION SUMMARY

Project Name or Title:

Wrap Around Services for Unhoused Youth and Families

Expected Completion Date: June 30, 2025

Requested CDBG Funds: \$ 18,000

Organizational Match: \$ 14,209

Funds from Other Sources: \$ 178,000

Total Project Cost: \$ 210,209

2) Maslow Project Summary

Maslow Project provides wrap-around, multi-lane services to meet clients where they are to provide the necessary services for their specific challenges. We have over twenty years of providing services to youth and families experiencing homelessness in Jackson County. **The needs for CDBG funds are great. Maslow was not a recipient of emergency order funding and heavily relies on CDBG funding to deliver services in the Ashland community.**

Multi-lane, wrap-around services include: **1) Stabilization:** offered throughout all our programs (centralized at our Resource Center and deliveries) provides food, hygiene, & essential needs, active navigation & facilitated referrals; promote safety and stabilization so people can focus on higher level life goals. **2) Case Management** offered to those most vulnerable - is the anchor to all our goal-based programming, offering intensive QMHA level services in support of individualized goals (education, wellness, employment, housing, etc. **3) Advocacy:** advocates remove educational barriers & connect families with resources; keeping homeless students engaged with school & earning credit toward graduation. **4) Outreach:** 4WD “Mobile Drop-In Unit” is stocked with clothing, food, hygiene supplies & emergency items provided to unsheltered youth/families street & rural outreach; delivery & mobile supports. **5) School Based Services:** Provide school supplies, help with transportation, & enrollment. **6) Permanent Supportive Housing:** housing navigation, life skills, and ongoing case management and support to ensure success once housed. **7) Transitional Housing-** emergency hotel stays.

We work to stabilize youth and families by providing resources for basic needs and services. Once stabilized, we can begin to start working on a client driven goal plan for education, employment, and housing. These services are stabilizing, provide a safety-net, and form the foundation of our relationship with our youth and families. Case Managers are the anchor to all of the services and supports. We proactively connect those we serve to other community-based programs, our work is client centered and is collaborative in design to accomplish their goal plan.

Case Managers work with clients on navigating community resources and supports that can otherwise be overwhelming and cumbersome. This individualized support addresses their specific needs to stabilize and move forward in their goals related to housing, education, and employment for the best possible outcome for the client. We are often the communication link between and among providers to ensure efficiency and avoidance of duplication of services, to stretch every dollar as far as possible.

Our work is rooted in trauma informed practices and with our staff having extensive training along with being QMHA certified. Our program is holistic in nature; providing a true client-centered approach that meeting them literally and figuratively – “where they are”. Our Navigation/Resource One-Stop Center (commonly called our Drop-In Center) provides a

centralized point of access to case management, advocacy, and resource distribution.

Our work is through the federal McKinney Vento law, lacking a fixed, regular, adequate nighttime residence. Most of our clients are school-aged. That means that families with children are living in tents, sleeping in vehicles, living in trailers that lack plumbing and electricity, or doubled up with friends or family. A significant percentage are families without transportation who live in the most rural areas of our region.

Every child should have opportunities to go to school, have nutritious food, and an adequate place to live. Inflation has caused many families on an elevated level of crisis over the past several years. With funding from CDBG we will be able to provide resource and support for those facing the most barriers to get help and support, but are often left off homeless counts. As a homeless youth and family service provider, Maslow Project responded immediately to the crisis. Most of our clients do not qualify for the funding through the state that addresses homelessness because they do not meet the HUD federal definition of homelessness. This leaves a huge gap in services for families with children. If we do not respond they are at risk for ending up in the street.

Depression, isolation, and hunger are up—leading to growing safety concerns. Our programs, weave together community resources with a hands-on approach to referrals and navigation – leveraging & maximizing community partnerships & resources, especially for populations with language or access barriers, and using our resources to address gaps and barriers. Maslow continues collaborations to effectively respond quickly in our community, schools, social service providers, health/mental health providers, law enforcement to facilitate safe camping & emergency shelter, & more housing opportunities with local Housing Authority, to name a few. Additionally, we have added bi-lingual/bi-cultural staff to respond to the growing need of Spanish speaking clients.

During the 22-23 program year we assisted 260 individuals find permanent housing through financial assistance, which is 85 families that had are now housed. Additionally, 127 people were sheltered in a hotel. 42 families are in our permanent supportive housing program. During Fall 2019 we began our partnership with the Housing Authority of Jackson County. We are currently providing Permanent Supportive Housing in Section 8 Project-based vouchers in Medford with 12 units, 8 in Central Point, and 15 units recently with Snowberry II in Ashland, and an additional 6 in White City this past fall. This new partnership helps our clients jump through a 3-4 year Section 8 HUD waiting list and will provide them with ongoing case management post housing to work toward skill and income building.

We propose a continuation of our partnership with the City of Ashland to add on to our comprehensive services for Unhoused Youth and Families. A new position to the Ashland based programming is a Permanent Supportive Housing Case Manager. She will work in coordination with our Ashland Case Manager and Family Advocate to work with students and families who are experiencing homelessness or at risk of homelessness to navigate the rental market, address existing barriers to attaining housing, the application process, and for those in our HAJC

units, ongoing case management working toward self-sufficiency. There is complex trauma associated with homelessness. Maslow is helping mitigate the effects of adverse childhood experiences (ACE's) and preventing long-term impact of chronic homelessness, as a result, our program provides both a high return on investment and long-term positive impact on the community.

Maslow Project's Wrap-Around Services to Unhoused Youth and Families addresses the high priority goals within the City of Ashland's Consolidated Plan of support services for homeless outreach, prevention services and transition. We will provide rent/security deposit assistance to prevent or alleviate homelessness and provide outreach/ direct service to homelessness populations. Additionally, we collaborate with over 40 agencies and the Executive Director sits on the Board of the Continuum of Care which addresses the goals and priorities set forth by HUD; aligning with the City of Ashland's priorities.

We are a direct service provider and also functions as a service "hub"; connecting our clients to community partners (e.g.: medical/dental/mental health, domestic violence, treatment/recovery programs, shelter) in a coordinated effort. Our school-based programs operate from a drop-in center inside Ashland High School allowing us to get upstream and help stabilize youth and ensure educational attainment – thus decreasing the number of youth who become chronically homeless adults. Further, our Street Outreach Team is a source of information and resources to homeless youth and families living on the street. They coordinate with other agencies for referrals and administer TAYSPDAT's for coordinated entry.

Project Objective: Provide stability to homeless youth and families experiencing or at risk of homelessness in the city of Ashland.

- **Objective 1:** Improved safety, health, problem solving skills, and resiliency. 100% of those contacted will have increased access to basic needs, linkages to community-based services, and a safety plan. Target: 100 individuals (youth & families)
- **Objective 2:** 50 clients will receive intensive case management service, service & resource navigation.
- **Objective 3:** 80% of the 50 clients in case management will develop two or more Positive, healthy and supports connections, & increased linkages
- **Objective 4:** 70% of the 50 clients in case management will make measurable growth on their self-sufficiency score
- **Objective 5:** 100% of the 15 families (45 -55 individuals) remain permanently housed in PSH housing

Total project for wrap-around case management and safety-net services, housing deposit/move in assistance, and readiness to rent through our Permanent Supported Housing is estimated at \$210,209.

3) Property and Project Information

N/A

4) Services to be Provided

Eligible Target Population: The population served through Maslow Project’s Ashland program consists of youth between the ages of 0-21 (and their families) residing in Ashland and meeting the McKinney-Vento definition of homelessness - defined by the McKinney-Vento Act as “any student who lacks a fixed, regular, and adequate nighttime residence.” Children may be unaccompanied, or homeless with their entire family. Youth participating in this program are identified in several ways: at point of enrollment in school, by school staff throughout the school year, through self-referral, by Maslow Project outreach staff, and through referrals from partnering agencies. 100% of this population are presumed by HUD to be LMI. 100% of the homeless youth and families we serve fall within the “extremely-low income” category, and earn 30% or less of the Area Median Income.

Services:

In addition to the comprehensive services listed above: 1) Stabilization 2) Case Management 3) Advocacy 4) Outreach 5) School Based Services 6) Permanent Supportive Housing Program 7) Transitional Housing we will do the following:

- Case Management and Basic Needs: food boxes, clothing, hygiene supplies, baby supplies, emergency assistance, etc. These services are inherently preventative and stabilizing, Case Managers also collaborate closely with other providers to ensure seamless wrap-around supports (crisis counseling, health care, employment, addiction, domestic violence, scholarships)
- Rural/Street Outreach: Our 4WD “Mobile Resource Center” is fully stocked with a selection of clothing, food, hygiene supplies and emergency items that can be immediately provided to unsheltered youth/families: delivering resources when they aren’t able to come to us;
- Advocacy: Remove barriers & connect families with resources; Develop individualized client goal plans, assist with accessing emergency/transitional housing, track relevant academic data, assist with educational and/or post-secondary goals;

School Based Services: Provide school supplies, help with transportation, enrollment, and connect families to relevant resources.

5) Work Program and Timeline

The program outlined in this application is ongoing; the activities will be conducted for the Wrap-Around Services funds from the Ashland CDBG during the time period of July 1, 2024 to June 30, 2025. Please see attached project schedule (Form A-2) for more details.

6) Financial Information

Project Expenses: Payroll is based on compensation for a 1) 1 FTE Case Manager (this is an increase in time from prior years), \$49,920; 2) 1 FTE Permanent Supportive Housing Case Manager \$49,920 3); 0.5 FTE Advocate, \$20,080, 5) Payroll tax and benefits are estimated at 26% of total wages, \$31,179.20. These costs are based on actual payroll reports. Payroll costs are based on agency salary schedules and in alignment with market rates. Barrier removal, safety-net needs, emergency hotels stays, deposit/security assistance funds: \$40,000. Indirect/admin rate of 10% of personnel costs estimated at \$19,110 and covered entirely by other non-CDBG sources. **Total cost of this project is \$210,209.** The amount requested from the Ashland Community Development Block Grant represents 16% of our Ashland program budget, and is an essential part of our program support. All other program costs are being leveraged with other funds, including administration and overhead. Please refer to Forms B-2 and C for more information.

7) Eligibility for Federal Funding

Our proposed program delivers the following Federally-eligible activities:

- Client Services
 - a. The proposed project is within the Ashland City Limits, and will take place at Ashland public schools; in public community gathering spots; and at our Resource Center as COVID allows.
 - b. Clients are classified as homeless under the McKinney-Vento Act. Homeless people are presumed by HUD to be principally persons of low and moderate incomes. As noted above, **100% of the individuals Maslow Project has worked with in Ashland since July 2012 fall into the “Extremely Low Income” category.**
 - c. This is a social service application; sections “d”-“i” are not applicable.

8) Maslow Project’s Mission and Service History

Maslow Project empowers youth to thrive independently through supports that stabilize and engage in all aspects of their life. We do this by providing resources for basic needs, removing barriers to education & employment, and fostering self-sufficiency in a collaborative & empowering environment. Our services include: 1) Stabilization; 2) Case Management; 3) Advocacy; 4) Outreach; 5) School Based Programs; 6) Permanent Supportive Housing; and 7) Temporary Emergency/Transitional Housing.

Maslow Project has almost two decades of experience providing evidence-based programs: grounded in best practices and producing life changing, outcome-driven results. Our work has always been trauma-informed, inclusive, and focused on equity. Maslow’s program model is intentionally youth-centered (a best practice). Other best practices we utilize include Trauma-Informed Care, Positive Youth Development - strength-based approaches that foster resiliency. These practices are woven throughout all our programs (low barrier, safe/calming spaces, client

rights and responsibilities, milieu style rapport-building and gold-standard client-care), and are designed to address the specific challenges facing our youth and their families. We also actively utilize evidence-informed approaches, including: Wrap-Around (holistic & integrated), co-case management with other providers, warm referrals, Harm Reduction and meeting youth “where they are at”; eliminating barriers to program access by offering services where youth already congregate (school-based programs, street outreach, drop-in centers). We currently coordinate with over 40 community-based organizations to promote optimal outcomes and stability of our clients - both on-site at our Resource Center and throughout Jackson County.

Executive Director Mary Ferrell founded Maslow Project in 2000 and oversees all programs at the highest level. She represents our clients’ needs on numerous local initiatives and participates in federal efforts that inform and address trends and best-practices for homeless youth-serving agencies across the nation.

9) Self-Sufficiency

Maslow Project’s Wrap Around Services for Unhoused Youth and Families program helps our clients (100% LMI) gain stability & move toward self-sufficiency and helps prevent adult homelessness. Our integrated, wrap-around services stabilize youth and families. Once stabilized clients can engage with case managers and begin the process of working on client driven goals to self-sufficiency related to education, employment, and housing. We coordinate with local agencies to ensure a comprehensive, unduplicated approach to providing services to our clients. Our services are preventive in nature and help to engage clients by using a strengths-based approach when working with individual client goal plans.

We also leverage additional resources to support this program: our *Client Assistance Fund* provides essential and lifesaving needs, our *Graduate Fund* provides Maslow youth an opportunity to continue once they have graduated and provide an opportunity to attend college, trade school or job training. Collectively, this approach helps individuals progress from being in crisis to becoming self-sufficient.

The population served through this project consists of youth between the ages of 0-21 (and their families) who reside in Ashland and meet the Federal Education McKinney-Vento definition of homeless, and are eligible for school enrollment. As noted above, all youth in this population are presumed by HUD to be low or moderate income. In our experience, **100% of homeless youth and families we serve fall within the “extremely low income” category, at 30% or less of the Area Median Income.**

10) Benefits to Extremely Low, Low, and Moderate Income Individuals

Youth homelessness takes a heavy toll on those it impacts. According to the National Center on Family Homelessness, homeless youth **go hungry at twice the rate** of other youth, are **sick four times more often** and have **three times the rate of emotional and behavioral problems**. In

addition, 47% of homeless children experience anxiety, depression and withdrawal, as compared to 18% of other school-aged children; and homeless youth are 87% more likely to drop out of school (USDE).

Maslow Project's Ashland program will serve between **100-145 unduplicated individuals** during the 2024-2025 year – approximately 50 of whom will participate in intensive Case Management and 15 Families in PSH services. These extremely low-income individuals will benefit from the following services:

Project Objective: Provide stability to homeless youth and families experiencing or at risk of homelessness in the city of Ashland.

- **Objective 1:** Improved safety, health, problem solving skills, and resiliency. 100% of those contacted will have increased access to basic needs, linkages to community-based services, and a safety plan. Target: 100 individuals (youth & families)
- **Objective 2:** 50 clients will receive intensive case management service, service & resource navigation.
- **Objective 3:** 80% of the 50 clients in case management will develop two or more Positive, healthy and supports connections, & increased linkages
- **Objective 4:** 70% of the 50 clients in case management will make measurable growth on their self-sufficiency score
- **Objective 5:** 100% of the 15 families (45 -55 individuals) remain permanently housed in PSH housing

In order to participate in Maslow Project's program, youth must be identified as homeless under the McKinney-Vento definition of homelessness. Homeless people are presumed by HUD to be principally persons of low and moderate incomes. Enrolled extremely-low or low-income homeless youth qualifying for services always have priority in our program, and will be able to access services regardless of the number of qualifying moderate-income individuals.

12) Demolition of Low and Moderate Income Housing

N/A

13) Project Feasibility

14) Impact on Significant Properties

15) Other Materials

Please see attached letters of support from Housing authority of Jackson County and the Maslow Project's Board of Director's List

The CDBG Application Checklist and Forms A-2, B-2, C and D follow this

16) CDBG Application Checklist

CITY OF ASHLAND

2024 Program Year

CDBG APPLICATION CHECKLIST

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

A. Applicant's Background	Yes	No	N/A
1. Is the applicant a legal non-profit organization or unit of government?	X		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	X		
3. Does applicant have the capability to maintain written income documentation?	X		
4. Has the applicant made a legal or financial commitment to a proposed project?	X		
5. Is the applicant primarily a religious organization?		X	
6. Has the applicant administered a CDBG project previously?	X		
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?	X		
B. Project Location and Land Use Issues	Yes	No	N/A
1. Has a location for the project been selected?			X
2. Is the proposed project within the Ashland City limits?	X		
3. Does the proposed project meet local zoning and land use laws?			X
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required?			X

5. Have these approvals been obtained?			X
6. Does the project comply with current building code requirements?			X
7. Does the project meet handicapped accessibility requirements?			X
C. Environmental Issues	Yes	No	N/A
1. Is the project located in the 100-year floodplain?			X
2. Is a wetland located on the project site?			X
3. Has any environmental contamination been identified on the project site?			X
4. Has asbestos been identified on the project site?			X
5. If project involves an existing structure, was it built 1978 or earlier? If year built is known, please specify.			X
6. Is the proposed project located on a major arterial or near the railroad?			X
7. Is the proposed project located adjacent to an above ground flammable storage tank?			X
8. Does the proposed project involve a structure that is 50 years or older?			X
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?			X
D. Labor Requirements	Yes	No	N/A
1. Does the project involve construction over \$2,000 in cost?			X
2. Will the project trigger Davis-Bacon wage requirements?			X
3. Will the project trigger BOLI wage requirements?			X
4. Does the project involve over \$18,703 in City awarded grants or contracts?			X
E. Displacement and Relocation	Yes	No	N/A
1. Will tenants be displaced by the project?			X
2. Will a business be displaced by the project?			X

3. Will housing units be demolished or converted?			X
F. Property Data	Yes	No	N/A
1. Does the applicant own the property by fee simple title?			X
2. Are taxes on the property current?			X
3. Is insurance current?			X
4. What is the current debt against the property?			X
5. What is the current use of the property?			X
6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property?			X

Form A-2
To be completed for Social Service Proposals

Social Services Proposals

Activity	Start Date	Completion Date
<p>Case Management and Advocacy: Identify homeless students, provide services/referrals/ basic needs, track academic data, establish client goals.</p> <p>Case Manager and Advocate will work with homeless youth and families on client driven goal plans related to employment, health, education, and housing to improve self-sufficiency.</p> <ul style="list-style-type: none"> • 100% of those contacted will have increased <u>access to basic needs, linkages to community-based services</u>, and/or educational advocacy. (Target: 100-150 homeless Ashland youth/family members). • 45 individuals that are most at need for services will receive resource and service navigation, linkage and warm-referrals to other organizations for the best possible outcome of the client • 15 families (45-55 individuals) will receive PSH case management services 	7/1/24	6/30/25
<p>Collect Outcome Data: Individuals & Families are assessed at start of case management with an intake appointment (improved employment and/or education) through on-going advocacy & case management:</p> <ul style="list-style-type: none"> • 80% of the 45 clients in case management will develop two or more Positive, healthy and supports connections, & increased linkages • 70% of the 45 clients in case management will make measurable growth on their self-sufficiency score • 100% of the 15 families will remain permanently housed in PSH <p>We have extensive intake, tracking, and documentation procedures in place. ClientTrack is our database for documenting assessments, demographics, tracking client services and program enrollments, and monitoring client progress.</p>	7/1/24	6/30/25

Social service providers should list key benchmarks in the table above for their proposed projects (IE hire of personnel, application for further funding, initiation of direct client services, etc.)

Form B-2
To be completed for Social Service Proposals

Social Service Proposals

	Total Cost	CDBG Request	Other Source(s)
Client Assistance / & Barrier Removal Funds / Deposits	\$40,000	\$0	\$40,000
Wages and benefits (of personnel providing direct client services) Case Manager, PSH Case Manager, & Advocate	\$151,099	\$18,000	\$133,099
Materials/Supplies	\$0	\$0	\$0
Marketing/Outreach	\$0	\$0	\$0
Program Administration Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration) but that does not provide direct benefits to the client.	\$19,110	CDBG Funds are not available for program administration	\$19,110
Total Project Cost	\$210,209	\$18,000	\$192,209

Form C

SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

Sources	Secured	Conditional (awarded with conditions)	Tentative	Commitment Date
Federal Grants	\$15,000 SOP	\$0	\$0	\$15,000 9/1/22'
State Grants	YEHP \$20,000 \$20,000 YDC	\$0		\$20,000 YDC & YEHP 7/1/23
Local Grants	\$20,000 ACCESS \$5,000 Butler	\$0	\$18,000 Ash. CDBG \$15,000 Carpenter Oregon Community: \$17,000	\$20,000 ACCESS Secured 12/23 \$5,000 Su -23' \$15,000 10/23 CDBG- Spring 24' OCF- \$17,000 8/24
Non- Governmental Grants	\$25,000 Ford Family Found. (3 year grant) Miller Foundation \$15,000 (2 year grant)		\$10,000 Providence Mental Health	\$25,000 TFF Secured 8/21 \$15,000 2/23 secured \$10,000 Providence 4/24

Donations/Gifts	\$0	\$0	\$14,209	FY 2024-2025
Applicant Contribution	\$0	\$0	\$0	N/A
Program Income	\$0	\$0	\$0	N/A
Loans	\$0	\$0	\$0	N/A
Other (specify)	\$6,000 Ashland School District	\$0	\$0	\$6,000 Secured 7/2023
Other (specify)	\$0	\$0	\$0	N/A
TOTAL	\$106,000	\$0	\$104,209	\$210,209

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates. Funds listed above include: Ashland School District: \$6,000 secured; Ford Family Foundation: \$25,000 secured; Miller Foundation: \$15,000 Secured; Oregon YEH: \$20,000 Secured;: Secured \$10,000; Carpenter: \$15,000 Secured, Federal SOP: \$15,000 secured; ACCESS SHAP rental deposits: \$20,000 – secured 12/23. Tentative: Ashland CDBG: \$18,000-applied; GS Butler Fund: \$5,000 (renewed annually); Providence Partners in Health: \$20,000,000 – applied; OCF Community: \$17,000 will apply; Individual Donations: \$14,209 to be raised in fiscal year.

Form D

DISCLOSURE OF INTERESTS

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME: Maslow Project

- Organization is:
- 1. Corporation ()
 - 2. Non-Profit 501C3 (X)
 - 3. Partnership ()
 - 4. Sole Owner ()
 - 5. Association ()
 - 6. Other () _____

DISCLOSURE QUESTIONS

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above mentioned "organization" or project proposed.

Name, Job Title and City Department

2. State the name(s) of any current or prior elected or appointed "official", of the City of Ashland having a potential "financial interest" in the organization or project.

Name/Title

 N/A

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

1 Scott Clauson, Board Chair – Executive/Development Committee

2 Jamie Hazlett, Past Chair - Executive/Program Committees

3 Lisa Morris, Vice Chair – Executive/Development Committee

4 Sharilyn Cano, Secretary – Executive/Development Committees

5 Amy Zarosinski, Treasurer – Executive/Finance Committees

6 Eric Maxwell- Program Committee

7 _____

8 _____

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.



HOUSING AUTHORITY OF JACKSON COUNTY

2251 TABLE ROCK ROAD MEDFORD OR 97501

PH/TDD (541) 779-5785

FAX (541) 857-1118

January 22, 2024

The Housing Authority of Jackson County is pleased to support this application from Maslow Project in support of their work with homeless youth and families in the Rogue Valley. Maslow helps this population overcome the numerous barriers to become stabilized and securing permanent housing. The work they do meets a critical and growing need in our community to help families address those barriers, navigate the steps and process for finding and securing housing, and often supporting the costs associated with application fees, deposits, and emergency hotels as a bridge resource to permanent housing.

The case management and navigation services Maslow Project offers to individuals both prior and post housing, help ensure skills are developed to promote better outcomes for both tenants and landlords. The Housing Authority of Jackson County currently partners with Maslow Project on 40 project based units in Jackson County and we look forward to supporting their work and growing our partnership to serve even more low income and homeless families.

Should you have any questions please contact me.

Sincerely,
Cara Carter

Cara Carter
Director of Housing Programs
Ext. 1002
cara@hajc.net



CITY OF ASHLAND
2024 Program Year Community Development Block Grant (CDBG)
Application

These completed Sheets shall be included as the first pages on all submittals.

I. APPLICANT INFORMATION

Applicant Organization Name:

Sunstone Housing Collaborative

Executive Director's Name(s): Krista Palmer

Board Member Names (attach separate sheet)

Jill Franko , Dan Ruby

Applicant Mailing Address:

919 Bellview Ave #1
Ashland, OR
97520

Applicant Street Address:

919 Bellview Ave #1
Ashland, OR
97520

IRS Classification: Public Charity Status 170(b)(1)(A)(vi)

Federal Tax ID#: 93-4638323

Mission Statement: (may be attached)

Sunstone Housing Collaborative was established in December 2023 to support the educational mission of Ashland School District and the associated Housing Production Strategy of Ashland by utilizing district owned land to develop affordable housing intended for district staff and low to moderate income families with children in order to increase long term sustained enrollment and retain staff members.

Total Employees: N/A **Total Volunteers:** 3

II. CONTACT PERSON (designate a contact person who is familiar with the project)

Name: Krista Palmer
Title: Executive Director
Phone Number: 949-278-7665
Fax Number: _____
E-mail Address: kristapalmer80@gmail.com

III. PROJECT INFORMATION SUMMARY

Project Name or Title:

Affordable Housing Development at E. Main and S. Mountain Ave in Ashland, OR_

Expected Completion Date: Phase 1: January 2026

Requested CDBG Funds: \$ 143,660.

Organizational Match: \$ _____

Funds from Other Sources: \$ 177,500.00 from Allcare

Total Project Cost: \$ initial estimated expenses for land acquisition \$700,000

Describe details regarding any property proposed for acquisition, indicating the following:

a) Property location relative to jobs, schools, transportation, shopping and services

The property lies central to the city of Ashland with the following resources within close proximity:

- RVTD Route 10 bus stop is within .5 miles which provides direct service from southern ashland to the Rogue Valley Transit Center in Medford
- Three public elementary schools within 1.5 miles, Two middle schools within 1 mile and high school less than .5 miles
- Hospital and medical services are within 2 miles and in proximity to bus routes
- Grocery shops are within .5 to 2 miles
- Being that the property is within the center of the city, access to employment is readily available

b) Total floor area of buildings, and size of land site

Size of land site is 4.18 acres

c) Types of residential units, number of each type of unit, and total number of bedrooms

Estimates of potential HAJC Apartments: (total 50 units with +- 97 bedrooms)

Studio/ 1bed 1 bath: 14

2bed/1 bath: 14

2/3 bed / 2 bath: 22

Estimates of other nonprofit partnered affordable housing: (total 42 units with +- 83 bedrooms)

Apartments:

1b/1bath: 8

2/ 3 bed / 2 bath: 15

Townhouses, 2 /3 bed / 2 bath: 12

Modular Housing, studio, 1bed/1bath: 7

d) Number of extremely low, low-, and moderate-income units proposed.

50 units proposed to be available to extremely low and low income, with 42 units available for low to moderate income

e) Number of units accessible to the disabled

In compliance with the following regulation, a minimum of 5 units will be fully accessible to the disabled.

[\(All Federally assisted new construction housing developments with 5 or more units must design and construct 5 percent of the dwelling units, or at least one unit, whichever is greater, to be accessible for persons with mobility disabilities. HUD.gov\)](#)

f) Square footage of units and description of amenities such as private balconies or storage areas

TBD through RFP process

g) Square footage of common areas such as community or laundry rooms

TBD

h) Square footage of commercial space if any

N/A

i) Year property was built. If pre-1978, will it be occupied by children under the age of six?

N/A Property is currently vacant land without improvements

j) Describe condition of any existing housing proposed for acquisition and any alterations planned. Briefly discuss the total cost of the proposal relative to new construction.

N/A Property is currently without existing housing

k) If the project involves rehabilitation attach a description of the work to be completed.

Historically, there was a pond on site which was questionably filled to construct the field (possible environmental concern pending review)

l) Describe the target population. Include the suitability of the property for the target population, the tenant selection process, brief description of any residential services and the resources identified to fund the services.

The target population for this property and subsequent improvements are individuals and families with children who meet income requirements of 30% AMI (extremely low income), 50% AMI (low income), 80% AMI (moderate income) with some targeting 100% AMI (medium income).

m) Indicate how many years the property will remain affordable and the mechanism that will be used to ensure the affordability period.

It is in the interest of the school district and the city of Ashland that the property and subsequent improvements remain affordable indefinitely. To ensure this status remains, when the sale of the land occurs, there will be stipulations within RFP for any builder to be singularly focused on the development of affordable housing units as defined by HUD.

4) Briefly describe the services to be provided, if any, and describe the eligible target population receiving direct benefit from these services (low-income, homeless, special needs).

Community space will be available to local service providers for the opportunity to partner in supporting the residents through onsite assistance as needs are identified.

5) A work program and timeline including a complete list of tasks with estimated start and completion of each task (please complete attached Form A – Project Schedule).

Rfp disbursement
Acquire property
Select developer
Begin construction
Projected completion

6) Financial Information

A budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. In addition to addressing the questions below please complete attached Form B – Uses of Funding & Form C – Sources of Funding. Provide a detailed financial description of the proposed project, including Rent Schedule, Sources/Uses of Funding and Operating Budget Income/Expense, and utility allowances.

a) Describe the assumptions used to determine the total project cost. Indicate the sources consulted and how costs were determined.

Land acquisition, RFP disbursement, development costs for 100 units, resources from Jackson county

b) Was consideration given to remaining economic life of the property and potential cost increases such as unanticipated repair or relocation costs? Maintenance costs? Operating costs?

(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)

Maintenance and operating costs tbd by future developer

c) Describe the financial assumptions used to develop the operating budget. Include projected rent increases, other sources of income for operation and maintenance expenses, and inflationary factors. For social service award requests please include financial assumptions relating to increases in wages, materials and overhead, or other costs associated with the proposed activity.

Tbd per rfp/developer

d) Discuss non-typical expenses or those outside industry standards.

Potential costs for energy conservation, modified construction, e-car charging, universal design

Through the RFP process, Sunstone Housing Collaborative will communicate the imperative of designing and developing housing that exceeds best practices regarding energy efficiency, sustainable construction methods and particular attention paid to utilizing universal design methods in order for the housing to be accessible to the widest population possible.

e) Attach letters of funding commitment from other sources, if available.

Included letter of funding from Allcare

f) Will a property tax exemption be requested for the project? If so, what is the estimated dollar value of the tax exemption over the twenty-year period? Please briefly detail the calculation method used to estimate the value and the process your organization would undertake to obtain the exemptions or appraised value adjustment.

(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)

This will be determined by the developer

7) Eligibility for Federal Funding

Will any of the following activities be part of the proposed project?

- **Property Acquisition** YES
- **New Construction (non-residential)** Yes, if included in this category are community resource buildings and resident storage
- **Removal of Architectural Barriers** NO
- **Rehabilitation Costs** NO
- **Development Costs** YES
- **Client Services** NO
- **Specification Preparation (Construction/Rehab)** YES, there will be demolition of current non-residential structures and preparation of city-required infrastructure
- **Relocation Benefits (if required)** N/A
- **Appraisal (for acquisitions)** NO, estimate of value obtained through ASD

Federal funding has certain regulatory requirements. The following information is required to determine eligibility for federal funding.

General Information

a) Is the proposed project within the Ashland City limits? If not, explain.

Yes

b) Specify the proposed tenant or client income level; state in terms of percentage below area median for the Medford-Ashland standard metropolitan statistical area (MSA).

The target population for this property and subsequent improvements are individuals and families with children who meet income requirements of 30% AMI (extremely low income), 50% AMI (low income), 80% MFI (moderate income) with some targeting 100% MFI (medium income).

c) Describe any financial or legal commitments made to the project. Housing Development, Land Acquisition, or Rehabilitation Specific Information

There have been no financial or legal commitments made with regard to this project.

d) Will permanent housing units be converted or demolished? If so, how many?

N/A as the site for proposed acquisition is currently undeveloped

e) Is the proposed housing site located in a 100-year flood plain?

This information will be determined upon completion of environmental assessment

f) Has a Level 1 environmental assessment been done for the site? If yes, attach the report.

No

g) Is the proposed housing site located adjacent to a major arterial road or near a railroad?

The proposed property is located approximately .3 miles from a railroad and .5 miles from the nearest arterial road (Siskiyou Blvd).

h) Is the proposed site located adjacent to an aboveground flammable storage tank?

No

i) Will the proposed project impact historic features? If yes, explain.

No

8) Briefly describe the agency's mission and service history. The City may request copies of the agency's financial audit or review for the last two years prior to contract signing in order to determine agency's capability to successfully complete the project.

Sunstone Housing Collaborative was established in December 2023 to support the educational mission of Ashland School District and the associated Housing Production Strategy of Ashland by utilizing district owned land to develop affordable housing intended for district staff and low to moderate income families with children in order to increase long term sustained enrollment and retain staff members.

Sunstone Housing Collaborative has built a partnership with the Ashland School District to secure an initial build site on the property currently owned by the district at E. Main and S. Mountain Ave in Ashland. This location ensures the opportunity for future residents to benefit from living in housing that is affordable, in proximity to public transportation, schools, and local employment; all factors that promote a thriving community.

As a long term focus, Sunstone Housing Collaborative exists to partner with landowners to facilitate the development of affordable housing in order to meet the growing gaps in housing available in Ashland and greater Jackson County.

9) Will the project promote self-sufficiency for extremely low-, low- moderate-income families, or individuals with special needs?

The development of new affordable housing promotes self-sufficiency of low-moderate income families by removing two of the primary barriers to obtaining and retaining a safe and reliable place to live: cost and availability. Secure and affordable housing enables people to focus on growing and thriving in the communities where they live. Self sufficiency for people with disabilities may be promoted with ground level ADA accessible housing units that foster inclusion in the greater community.

10) Please identify how your project benefits extremely low-, low- and moderate-income individuals or individuals with special needs.

The development of new affordable housing in the center of Ashland can help mitigate the consequences of financial instability that low and moderate income individuals face, particularly when a majority of their income is spent on a place to live. Reducing the amount of money required to obtain housing enables low and moderate income individuals to gain physical and financial security that might otherwise be impossible, creating potential for greater involvement in community life through education, commerce and public service.

a) For proposed projects serving a low-income area (i.e. public facility improvements, community center or other neighborhood serving facility), provide the following data, including documentation of the sources of information for the following statistics: N/A

• **Number of extremely low-, low- and moderate- income individuals served in the project area on an annual basis.** 100% of project will meet this need

• **Total number of individuals served in project area on an annual basis.**

Tbd based on developer. Minimum goal of 100 households to be specified in RFP.

b) For proposed projects serving a target population (i.e. homeless families, battered women, people with AIDS, special needs populations, etc.) provide the following data, including document sources of information for statistics. NO

• **Specify the target population to be served.**

Low and moderate income individuals and families

• **Number of low and moderate-income individuals in target population to be served on an annual basis. (This count cannot include repeated visits or use by the same individuals.)**

TBD based on occupancy

• **Total number of individuals in target population to be served on an annual basis.**

TBD based on occupancy

• **Percent low and moderate income.**

100%

11) Briefly describe how your proposal will ensure that moderate- income individuals do not benefit to the exclusion of extremely low or low-income individuals.

The housing will be available exclusively to low and moderate income individuals that meet income eligibility requirements

12) Indicate if you expect the project to cause low and moderate- income housing to be demolished or converted to another use (see attachment “Relocation Strategy Guidance”). If so, explain

N/A

13) Project Feasibility: Please describe your readiness to proceed concerning whether land use issues have been resolved and whether your organization has the administrative capacity to complete the project proposed.

Describe the feasibility of the project:

a) Does the applicant have the experience and capacity to complete and or manage the project proposed? Briefly describe applicant’s capacity and experience in providing, maintaining and managing housing, particularly low-income housing similar to the proposed project.

This will be answered by the skills and specialties of individuals who comprise the board.

SHC is acting in capacity as liaison and project manager with the developer, on behalf of the school district. Developer to be selected through RFP requiring that applicants have the experience and capacity to acquire funding and develop affordable housing needs as outlined.

b) Are the ongoing operating expense and maintenance reserve estimates reasonable?

Yes. Land values estimate has been determined by recorded market values.

c) Does the applicant have a purchase option on the property, letter of support from the property owner(s), or some other assurance that the property is available for acquisition?

The applicant (Sunstone Housing Collaborative) will have a master service agreement with the Ashland School District to ensure the transfer of land to the applicant for its sale and subsequent development.

d) Does the project require temporary or permanent relocation and if so, have comparable units been identified and costs of relocation been accurately determined? Provide a tenant relocation strategy, cost estimate and existing tenant survey to address federal Uniform Relocation Act requirements which may impact your project.

N/A

e) Describe relocation strategy for the project.

N/A

f) Does the project require land use approvals such as Site Review, Annexation, Zone Change, Minor Land Partition, Demolition, or Conditional Use permits?

No

g) Has a pre-application been completed with the Ashland Planning Department?

No

h) What is the condition of any improvements on the property and what is the expected life of the property?

Existing improvements upon the property include a baseball field, dugouts, restroom building, maintenance shed all of which will be demolished for the development of housing.

i) Describe commitment of project funding from other sources

Sunstone Housing Collaborative has received \$177,500 from AllCare Health that will contribute to administrative and legal fees for the initial phase of the project which includes compiling and releasing an RFP for development of at least half of the land. Additional funding has been requested through Jackson Care Connect and the City of Ashland Social Services Grant.

14) Indicate whether the project will have any negative impacts on historic or architecturally significant properties on the environment. All projects will be subjected to an Environmental Review Report and certain projects depending on scale, i.e., new construction, must undergo an Environmental Assessment.

The current state of the land and its improvements do not indicate a significance that prohibits their demolition for the purpose of developing housing.

15) Please attach any other statistical data, letters of support, applicable experience of the sponsor, evidence of financial support from other funding sources, or other material you believe will assist the City in its review of your proposal.

16) CDBG Application Checklist (included)

Form A-1
To be completed for Development or Rehabilitation Proposals

Housing Proposals

Activity	Start Date	Completion Date
Site Planning & Development	TBD per RFP Respondant	
Option		
Site Acquisition		
Plan Development		
Pre-application		
Land Use Approval		
Construction Plans		
Final Bids		
Contractor Selection		
Building Permits		
Grant applications		
local	City of Ashland SS Grant 1/24	
state		
federal		
Non-government		Allcare received 2/2024
other		
Loan Applications		
Construction loan	N/A	N/A
Permanent	N/A	N/A
Construction Phase		
Construction	12/2024	5/2025
Certificate of Occupancy	5/2025	12/2025

Please provide your best (realistic) date estimates regarding the project schedule

Form B-1
To be completed for Development or Rehabilitation Proposals

Uses of Funding

Housing Proposals

	Total Cost	CDBG Request	Other Source(s)
Acquisition Costs			
Land	700,000.00	143,660.00	\$177,500 from Allcare
Improvements	n/a		
Liens and other Taxes	tbd		
Closing costs	tbd		
Off-Site costs	tbd		
Other			Pending City of Ashland SS Grant
SUBTOTAL			
Development Costs	All development costs tbd based on selected respondent to RFP. Will provide report upon receipt		
Land Use Approvals			
Building Permits/fees (Include Engineering and Community Development Fees)			
System Development Charges (SDCs)			
Relocation Costs			
Environmental Report / Lead Based Paint Clearance			
Soils Report			
Survey			
Marketing			
Insurance			
Other			
Fees	All additional fees tbd based on selected respondent to RFP. Will provide report upon receipt.		
Architectural/Engineering			
Legal/Accounting			
Appraisals			
Lender fees			
Construction Loan			
Permanent Loan			
Tax Credit Fees			
Developer Fee			
Consultant Fee			
Other			
TOTAL	est. \$100,000,000	143,660.00	est. \$177,500.00

Form C

SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

Sources	Secured	Conditional (awarded with conditions)	Tentative	Commitment Date
Federal Grants				
State Grants			LIFT program funding	
Local Grants			City of Ashland SS Grant	
Non-Governmental Grants	Allcare \$177,500			2/2025
Donations/Gifts				
Applicant Contribution				
Program Income				
Loans				
Other (specify)			OCF Reed & Carolee Walker Grant	
Other (specify)			US Bank Community Funding Grant	
TOTAL				

Please provide a description of the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates.

City of Ashland SS Grant: Application submitted 1/26/2024

Allcare grant awarded 1/2024, funding availability 3/2024

OCF Reed and Carolee Walker Grant application due Feb 12, awarded 5/2024

US Bank Community Funding Grant application due 7/2024, awarded 12/2024

Oregon LIFT funding proposal due 9/2024

Form D
DISCLOSURE OF INTERESTS

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME:

Sunstone Housing Collaborative

- Organization is:
- 1. Corporation ()
 - 2. Non-Profit 501C3 (x)
 - 3. Partnership ()
 - 4. Sole Owner ()
 - 5. Association ()
 - 6. Other () _____

DISCLOSURE QUESTIONS

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above-mentioned "organization" or project proposed.

Name, Job Title, and City Department

N/A

2. State the name(s) of any current or prior elected or appointed "official" of the City of Ashland having a potential "financial interest" in the organization or project.

Name/Title

N/A

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

- 1 Jill Franko
- 2 Dan Ruby
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____
- 9 _____
- 10 _____
- 11 _____
- 12 _____
- additional _____

Having recently received approval for nonprofit status from the IRS on 1/19, Sunstone Housing Collaborative is in the development stage of assembling a board of directors.

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.

CITY OF ASHLAND
2024 Program Year
CDBG APPLICATION CHECKLIST

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

A. Applicant's Background	Yes	No	N/A
1. Is the applicant a legal non-profit organization or unit of government?	x		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	x		
3. Does applicant have the capability to maintain written income documentation?	x		
4. Has the applicant made a legal or financial commitment to a proposed project?		x	
5. Is the applicant primarily a religious organization?		x	
6. Has the applicant administered a CDBG project previously?		x	
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?		x	
B. Project Location and Land Use Issues	Yes	No	N/A
1. Has a location for the project been selected?	x		
2. Is the proposed project within the Ashland City limits?	x		
3. Does the proposed project meet local zoning and land use laws?	x		
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required?	x		
5. Have these approvals been obtained?		x	
6. Does the project comply with current building code requirements?	x		
7. Does the project meet handicapped accessibility requirements?	x		

C. Environmental Issues	Yes	No	N/A
1. Is the project located in the 100-year floodplain?		x	
2. Is a wetland located on the project site?		x	
3. Has any environmental contamination been identified on the project site?		x	
4. Has asbestos been identified on the project site?		x	
5. If project involves an exiting structure, was it built 1979 or earlier? If year built is known, please specify.			x
6. Is the proposed project located on a major arterial or near the railroad?	x		
7. Is the proposed project located adjacent to an above ground flammable storage tank?		x	
8. Does the proposed project involve a structure that is 50 years or older?			x
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?	x		
D. Labor Requirements	Yes	No	N/A
1. Does the project involve construction over \$2,000 in cost?		x	
2. Will the project trigger Davis-Bacon wage requirements?		x	
3. Will the project trigger BOLI wage requirements?		x	
4. Does the project involve over \$18,703 in City awarded grants or contracts?			x
E. Displacement and Relocation	Yes	No	N/A
1. Will tenants be displaced by the project?		x	
2. Will a business be displaced by the project?		x	
3. Will housing units be demolished or converted?		x	
F. Property Data	Yes	No	N/A
1. Does the applicant own the property by fee simple title?			x
2. Are taxes on the property current?	x		
3. Is insurance current?	x		
4. What is the current debt against the property?			x
5. What is the current use of the property?			x
6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property?		x	



December 20, 2023

Jill Franko
955 Bellview Ave.
Ashland, Oregon 97520

Dear Jill,

Thank you for your funding application to the AllCare Health SHARE Fund for **“Teacher, Staff, Student Housing Ashland School District”**. The Community Health Integration Team is very pleased to award **Ashland School District** with **\$177,500.00** towards the implementation, success, and expansion of the work that you do. This funding is awarded toward the purposes detailed in your application documents. The sideboards include: **SIDEBOARDS NOTED HERE (BOLD SIDEBOARD)**.

We appreciate the opportunity to support your work and are eager to learn more about the impact **“Teacher, Staff, Student Housing Ashland School District”** has in the community. We are particularly interested in vignettes demonstrating effectiveness and in measurable outcomes related to providing your program. These would include projected outcomes listed in your application: **provide a minimum of 60-100 units of affordable housing to families and teachers, and increase our student enrollment by 150-200 new students.**

Please reference this reporting schedule for your convenience:

Progress Report: **07/15/24 and 01/15/25**

Final Project Outcomes Report: **01/15/26**

Report Link: <https://app.smartsheet.com/b/form/702964464683482986d067ce05df325e>

In addition to regular reporting, please update our team with relevant news stories, events, and media coverage related to **“Teacher, Staff, Student Housing Ashland School District”**. These stories help us to better understand the human and community aspects of your work. Your application indicated that you will be providing the following recognition for this grant: **AllCare logo on agency banner or signage**. Please contact our Branding Department at branding@allcarehealth.com for logos and templates and to notify us of any planned recognition so we may share on our Facebook page, <https://www.facebook.com/AllCareHealthOR>.

If you foresee any obstacle in using donated funds as described or meeting reporting deadlines, please contact Jennifer Gustafson at Jennifer.Gustafson@allcarehealth.com for assistance, extension, or to arrange the return of the funds.

We appreciate the work that you and your colleagues do to improve lives in Southern Oregon and statewide and we look forward to working together.

Sincerely,

Doug Flow, PhD
Chief Executive Officer

Jill Franko/Date

Certified



Corporation

AllCare CCO, Inc., An Oregon Benefit Company

1701 NE 7th St.
Grants Pass, OR 97526
Phone (541) 471-4106
Fax (541) 471-3784
Toll free (888) 460-0185
TTY (800) 735-2900
AllCareHealth.com/Medicaid

DATE: March 28, 2024
TO: Housing and Human Services Advisory Committee
FROM: Linda Reid, Housing Program Manager
DEPT: Planning
RE: CDBG Application Staff Evaluation

The City of Ashland is expecting a total of **\$179,575** in Community Development Block Grants (CDBG) for the 2024 Program Year. The City of Ashland may not receive final notification of the annual CDBG award amount from the Department of Housing and Urban Development until after awards have been made. The estimate is included to provide guidance to applicants regarding the expected amount of available funds. The City will reserve the right to award more or less than this estimate depending on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

Under CDBG regulatory limits only 15% of the anticipated 2024 allocation is available for social services and thus such awards are limited to approximately **\$26,936**. The City also utilizes 20% of the annual allocation for administrative costs. The amount of funding available for award to capital improvement projects is approximately **\$143,660**.

The City of Ashland Housing and Human Services Advisory Committee will review the grant requests and make a recommendation for grant awards to the City Council. Subsequently, the City Council will hold a public hearing and make a final decision on the grant award(s) at their regular meeting held on April, 19, 2024.

The City of Ashland has received one application for capital funding (the entire amount of funding less administrative costs are eligible for capital projects). The city received one application for public service funding (which can be 15% of the total allocation).

Staff's eligibility assessment of each of the proposals received, and recommendations regarding the allocation of the 2024 CDBG funds are provided on the following pages.

Planning Department

20 East Main Street
Ashland, Oregon 97520
ashland.or.us

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



Proposals Received

Organization	Proposed Project	CDBG Funds Requested	Goal	Consolidated Plan Goal
Maslow Project	Encourage stability, self-sufficiency, and school achievement for homeless youth. *Public Service	\$18,000	Homeless Goals: Provide access to basic needs, information, and referral. Provide case management and housing to improve stability to approximately 100 identified homeless youth ages 0-24.	Public service activities other than Low/Moderate Income Housing Benefit: 100 Persons Assisted Public service activities for Low/Moderate Income Housing Benefit: 50 Households Assisted
Sunstone Housing Collaborative	Affordable Housing Development intended for district staff and low to moderate income families with children. *Capital Project	\$143,660	Access to housing units that are affordable and suitable to low-, and moderate-income and special needs households. Approx. 92 units of housing anticipated to be created.	Rental Units Constructed: 15 Household Housing Units Homeowner Housing Rehabilitated: 15 Household Housing Units.

Funding Requested/Available

A total of **\$143,660** in regular CDBG funding is available to distribute to eligible recipients for projects meeting the CDBG national objectives, and which are consistent with the City of Ashland 5-year Consolidated Plan.

CDBG funds will be available upon approval of the 2024 Action Plan, and upon the completion of any regulatory requirements including but not limited to environmental review clearance. Upon completion of the Action Plan a public hearing for review and

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approval will be held before the Housing and Human Services Advisory Committee to ensure consistency with the awards designated by the City Council. The U.S. Department of Housing and Urban Development (HUD) must review the Annual Action Plan submitted by the City to ensure the activities funded are consistent with federal requirements, and with the local Consolidated Plan. The City will reserve the right to award more or less than this estimate dependent on the final entitlement amount authorized by Congress and the Department of Housing and Urban Development.

Assessment Criteria

Staff has assessed the proposals to determine whether they meet the Federal CDBG regulations and address the priorities identified within the City of Ashland 5-year Consolidated Plan.

Three areas are evaluated for each proposal regarding compliance with federal regulations.

- Projects must meet the National Objective of the Community Development Block Grant Program.
- All CDBG funded projects must be an “eligible” use under the Community Development Block Grant Program.
- If a project meets all federal requirements and is selected for award, then federal regulations must be met throughout the course of the project.

Some examples of federal regulations which pertain to Community Development Block Grant funded projects are: all projects funded in whole or in part, with CDBG dollars require an environmental review in accordance with the National Environmental Policy Act (NEPA). Certain construction projects must use federal Davis-Bacon wage rates. Housing involving structures built prior to 1978 must be tested for the presence of Lead Based Paint and if found steps to mitigate Lead Based Paint must be taken. Any project involving the displacement of residents or businesses as a result of the federally funded project are entitled to assistance under the Uniform Relocation Act. Most importantly the beneficiaries from the application of CDBG funds must qualify as eligible populations under the Federal requirements for the CDBG program. Areas of concern are described for each proposal received. The Housing and Human Services Advisory Committee and the City Council can only award CDBG

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funds to projects that can meet all federal requirements and meets an objective as outlined in the City's 5-year Consolidated Plan.

Priorities within the City of Ashland's 5-year Consolidated Plan are given a priority ranking of High, Medium, or Low. The rankings are intended to assist in directing CDBG funds to the greatest needs. In cases where there are competing projects for limited funds, the projects(s) that are ranked the highest will be funded.

Public Service Proposal Evaluation

Maslow Project-School Based Services for Ashland Homeless Youth

Staff has reviewed the Maslow Project, School Based Services for Ashland Homeless Youth Proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland 2020-2024 Consolidated Plan. Maslow Project requested \$18,000 in Public Service Grant funds to continue to support a case manager in the elementary, middle, and high schools, providing outreach to high-risk homeless youth and providing them with immediate needs, case management to keep youth engaged in school and promote stability and self-sufficiency for the homeless youth and their families, and to provide temporary housing to homeless youth and families engaged in services.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective; homeless populations are a presumed benefit population under the CDBG program.
- Services to homeless and at-risk populations are an eligible use of CDBG funds.
- Maslow's proposal expects to provide services and housing to 100 identified homeless school children currently enrolled in the Ashland School District.
- Maslow Project has proven capacity to administer CDBG grant funds-this would be Maslow's ninth year of undertaking this activity in Ashland.
- Staff finds that Maslow Project's proposal is consistent with goals identified in the City of Ashland's 5-year Consolidated Plan.

Staff sees that Maslow Project's proposal is an eligible use of CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5-year

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Consolidated Plan. This activity assists in the prevention of homelessness for low-income households. Maslow has successfully administered this program within the Ashland School District for the several years. Furthermore, this project meets and exceeds the 10% leverage requirement of the City of Ashland's CDBG program and leveraging funding from other sources.

Capital Improvement Proposals

Sunstone Housing Collaborative

Staff has reviewed the Sunstone Housing Collaborative Proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland 2020-2024 Consolidated Plan. SHC requested \$143,660 in Capital Grant funds to buy down the cost of land to offer to and affordable housing provider through a Request for Proposals process.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective.
- Acquisition of land on which to develop housing for low-moderate income populations is an eligible use of CDBG funds.
- SHC's proposal is expected to support the development of approximately 92 housing units.
- SHC has not previously administered CDBG funding, this would be their first CDBG funded project.
- Staff finds that SHC's proposal is consistent with goals identified in the City of Ashland's 2020-2025 Consolidated Plan.
- While the acquisition of land for affordable housing development could be disaggregated from the Environmental Review process with justification, in this particular instance, the RFP would need to state that the selected developer would be required to complete an Environmental Review prior to the start of any development. The City could complete an the Authority it Use Grant Funds form, that clarifies that no work can happen on the site until another ER is completed that includes the housing construction portion of the project. If the site is disturbed before that ER is complete, then it is considered by HUD as a Choice-Limiting Action and the city would be subject to possible repayment of the CDBG funds.
- The Applicant would need to complete an Arm's length agreement with the school district prior to the award of funds.

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- While the timeline provided for the activity is reasonable and relatively short, the timing of the completion of the development is important because land banking is not an eligible activity with CDBG funding, as beneficiary data must be provided to show eligibility for low-,mod-income benefit.

Staff sees that SHC's proposal is an eligible use of the CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5-year Consolidated Plan. This activity is expected to provide a needed housing type identified in the City's Housing Capacity Analysis and represents a level of commitment to the provision of affordable housing from the Ashland School District, which has not been seen before. This project is expected to create both workforce housing as well as providing affordable housing, both of which are very needed. This activity is expected to leverage several sources of funding that will meet and exceed the 10% leverage requirement of the City of Ashland's CDBG program.

STAFF RECOMMENDATIONS

Staff's recommendations are based on evaluation of CDBG eligibility, the City's five-year Consolidated Plan Goals, agency experience and capacity, and readiness to proceed.

Public Service Projects: The City received one public service project proposal. Maslow Project has a successful track record of providing resource referrals and, case management to homeless populations and those at risk of homelessness. Maslow Project's proposed activity would continue to provide needed services to alleviate and prevent homelessness. Maslow Project staff have the proven experience and capacity to administer CDBG grant funds and have exceeded the matching requirements of the grant. Staff understands that this project is a proven and effective strategy for addressing and preventing homelessness and provides a needed and valuable service to the community. Staff is supportive of fully funding this activity.

Capital Projects: The City received one capital project proposal, SHC's land acquisition project. The project qualifies as eligible uses of CDBG funds, the project, has some environmental and beneficiary outcome issues in the short

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term, which will be addressed further into the implementation timeline (at identification and contract with an affordable housing provider). Consequently, City staff would recommend providing a provisional funding award of the remaining funding to the project contingent upon a couple of specific items:

- The identification of the Affordable Housing developer and the completion of an agreement that the developer will meet the environmental review conditions required by the grant.
- A timeline from the affordable housing developer identifying the expected completion date for the project in order to meet the eligibility criteria required by HUD.

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