



Housing & Human Services Advisory Committee Meeting Agenda

ASHLAND HOUSING & HUMAN SERVICES ADVISORY COMMITTEE

REGULAR MEETING AGENDA

Thursday, February 26, 2026

Siskiyou Room, 51 Winburn Way

4 pm

Note: Anyone wishing to speak at any Housing and Human Services Advisory Committee meeting is encouraged to do so. If you wish to speak, please rise and, after you have been recognized by the Chair, give your name and complete address for the record. You will then be allowed to speak. Please note the public testimony may be limited by the Chair.

Zoom Link: <https://zoom.us/j/93712009632>

I. CALL TO ORDER

II. APPROVAL OF THE AGENDA

III. CONSENT AGENDA

- A. Approval of December 18, 2025, Minutes

IV. PUBLIC FORUM

- A. Public Forum.

V. NEW BUSINESS

- A. Social Service Grant Presentation (4:15-5:05 p.m.)
- B. Social Service Grant Application Review and Recommendation (5:05-5:25 p.m.)
- C. Recreational Vehicles in Single Family Neighborhoods Discussion (5:25-5:45 p.m.)

VI. UNFINISHED BUSINESS

VII. INFORMATIONAL ITEMS

- A. Liaison Reports.
- B. General Announcements.

VIII. AGENDA BUILDING - FUTURE MEETINGS

IX. ADJOURNMENT: 6:00 PM

If you need special assistance to participate in this meeting, please contact Linda Reid at linda.reid@ashlandoregon.gov or 541.488.5305 (TTY phone number 1.800.735.2900). Notification at least three business days before the meeting will enable the City to make reasonable arrangements to ensure accessibility to the meeting in compliance with the Americans with Disabilities Act.



Housing And Human Services Committee Minutes

December 18, 2025
REGULAR MEETING
Minutes

Commissioner's Present:	Council Liaison:
Echo Fields	Bob Kaplan
Montana Hauser	
Jim Dykstra	
Noah Werthaiser	Staff Present:
Montana Hauser	Linda Reid; Housing Program Specialist
John Maher	SOU Liaison:
Ashley Laube	Vacant
Commissioner's Absent	

I. CALL TO ORDER: 4:05 p.m.

II. CONSENT AGENDA

A. Approval of October 23, 2025, Minutes

Werthaiser/Fields M/S. Voice Vote: ALL AYES. The minutes from October 23, 2025, were approved with two corrections: a date correction, and a correction to the spelling of Vice Chair Hauser's name.

III. PUBLIC FORUM (4:05-4:15 p.m.)

A. Public Forum.

No one spoke

IV. NEW BUSINESS

A. Review of Goals for 2026

Committee members reviewed and discussed the goals that were identified at the November 20th Meeting. Committee members want to brainstorm to come up with a more inclusive term for YIMBY. Committee members talked about coming up with an infographic to visually define affordable housing

Homeless goals use HMIS data to provide education about resources needs. The question was asked "what do we need to know, what types of information will help the Council Make good decisions?" We need to ask the Council what types of information would be most helpful to them.



Housing And Human Services Committee Minutes

Development process goals: Committee members discussed taking a deep dive into fees and incentives: Get feedback from stakeholders outside of the Planning process. Learn about how to streamline the process across all departments to help reduce costs/overhead. Look at previous efforts to get feedback and potentially elicit new feedback from developers.

B. Workplan Review

Committee members reviewed and discussed workplan for the coming year.

C. Nominations for Committee Chair and Vice Chair

Laube/Maher M/S Committee Member Werthaiser for Chair, with Committee Member Hauser continuing as Vice Chair. Motion was approved Unanimously.

V. UNFINISHED BUSINESS

None.

VI. INFORMATIONAL ITEMS

A. Liaison Reports-Councilor Kaplan provided the Liaison report.

B. General Announcements

VII. AGENDA BUILDING – Future Meetings

- C-Pace Program Overview
- Grant Application Review
- RV's in Single Family Neighborhoods

VIII. ADJOURNMENT: 6:00 p.m.

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please email linda.reid@ashland.or.us. Notification 72 hours prior to the meeting will enable the City to make reasonable arrangements to ensure accessibility to the meeting (28 CFR 35.102-35.104 ADA Title 1).

Memo

DATE: February 26, 2026

TO: Housing and Human Services Advisory Committee

FROM: Linda Reid, Housing Program Manager

DEPT: Planning

RE: Social Service Grant Presentations and Committee Evaluation and Recommendations

Social Services grant money is funded through the City's General Fund. The City received ten applications totaling over \$236,000 in response to the request for proposals. The City of Ashland Housing and Human Services Advisory Committee will review the grant requests and will make a recommendation for grant awards to the City Council. Subsequently, the City Council will hold a public hearing on April 21, 2026, and will make a final decision on grant awards.

Applicants will have the opportunity to speak briefly about their proposals and answer questions regarding their proposals. Presentations are optional and are not mandatory to receive funding. Presentations will be in alphabetical order providing about five minutes for each presenter depending on the number of presenters in attendance.

1. Ashland Emergency Food Bank
2. Center for Non-Profit Legal Services
3. Community Works, Dunn House
4. Food and Friends-Rogue Valley Council of Governments
5. Jackson County SART
6. OHRA
7. Rogue Valley Mentoring
8. Southern Oregon Jobs with Justice
9. St. Vincent De Paul
10. United Way

Planning Department

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

Tel: 541.488.5300
Fax: 541.552.2059
TTY: 800.735.2900



City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Ashland Emergency Food Bank **DATE:** 2/3/2026

OTHER NAMES ORGANIZATION KNOWN BY (DBA) Ashland Community Food Bank

ADDRESS 560 Clover Lane Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Removing Transportation Barriers to Food Access in Ashland

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? • Supports to increase accessibility and availability of transportation c

AMOUNT REQUESTED from this funder for this program/project **2026-2027 \$**

GRANT CONTACT (If other than Executive Director listed below)

Name

Telephone **E-mail**

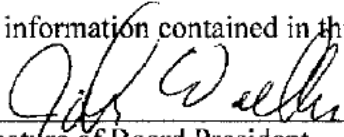
EXECUTIVE DIRECTOR INFORMATION

Name Catie Mahoney

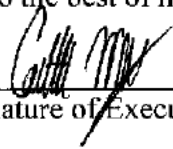
Telephone 484 947 4346 **E-mail** director@ashlandcfb.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.


Signature of Board President

Interim: John Wallar
Type Name


Signature of Executive Director/CEO

Catie Mahoney
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

1. Program/project is: new ___ established/continuing X pilot ___ If pilot, expected duration _____

2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*

We serve families living in Ashland or Talent and surrounding rural areas with 97520 or 97540 zip code. 85% Ashland residents, 15% Talent residents

3. What will this funding enable?

This funding will enable a wider variety of food to be offered for our home delivery program and provide the opportunity for additional households to enroll in our home delivery program.

This would help to expand our services to new geographical regions, increase our capacity for serving families outside of our standard hours, address language barriers, and reduce stigma associated with food access.

4. Number of volunteers this program/project will engage: 94

Number of paid program employees this program/project will engage: 3

5. Total number volunteer's agency utilizes: 156

Total number of paid agency employees: 4

6. Outline key strategies of the project/program with timeline and staff structure.

The Ashland Community Food Bank's no-cost grocery home delivery program directly advances the City of Ashland Social Service Grant Program mission to improve the lives, health, and wellbeing of Ashland residents, particularly those who are most vulnerable. This program addresses the Strategic Priority of increasing accessibility and availability of transportation options by removing transportation barriers to essential nutrition for frail seniors, people with disabilities, individuals with mental health challenges, and low-income households. For residents who are unable to drive, afford transportation, or safely use existing transit options, grocery delivery functions as a critical transportation support, ensuring access to healthy food while promoting housing stability, physical health, and the ability to safely remain in the community. This program leverages established community infrastructure and proven service capacity to provide a ready-to-proceed, cost-effective solution to a documented community. Households will be eligible to receive home deliveries twice per month for 12 months, a total of 24 deliveries. We will:

- Expand our referral partnerships with other organizations in the area to identify households in need
- Train all staff members to conduct enrollment and delivery for the home delivery program
- Conduct evaluation to assess project outcomes

Community engagement will take place through volunteer and internship opportunities to support the project.

7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

We will use qualitative and quantitative data collection methods to evaluate: service reach, reduction in barriers, and operational capacity.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
- 2. What:**
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
- 3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)**

- a. Our mission is: "In solidarity with our community, the Ashland Community Food Bank sustainably provides food at no cost to all those in need living in Ashland and Talent, while increasing awareness of food insecurity. We serve all people with dignity."
 - b. This initiative fits our mission as it creates a dignified way for community members facing transportation and access barriers to receive food support. Food access is foundational for health and well-being, addressing a core need and increasing quality of life for vulnerable populations. We have been offering home delivery services to the community and are uniquely poised to expand this initiative as we have the infrastructure, volunteer capacity, and community partnerships in place to do so. In 2025, 7% of all the food distributed by the Food Bank was done via home delivery.
 - c. Ashland Community Food Bank policies and procedures are rooted in a client-centered approach. Our volunteers and staff go through extensive trauma-informed care training, and in 2026 we expanded these training courses to include monthly workshops with breakout sessions. Additionally, we regularly seek feedback from clients and make program modifications to best suite community needs. The primary languages of our client base are English and Spanish, and thus all our materials are available in English and Spanish, and we have bilingual support on site for services.
- 2. a.** This transportation intervention supports community members with mental and physical health issues, aging adults, and low-income working families.
- b.** This method of food access eliminates the need for vulnerable populations to travel, reduces physical and mobility barriers, and ensures services are available to those who have previously not been reached.
- c.** Given the success of the existing home delivery program, along with the potential to collaborate with additional social service and health partners for referrals, and the additional transportation challenges with bus routes being cut, this is a timely intervention.
- d.** Success measurements will include number of households served, number of total people served, number of home deliveries completed, number of volunteers trained to conduct home deliveries. For quantitative data, we will use our Pantry Soft software which tracks data related to clients, visits, and types/pounds of food distributed. Additionally, we will collect qualitative and quantitative data from participant feedback surveys.
- 3.** This program would allow for additional collaboration between social service agencies and healthcare providers to best serve vulnerable populations. It would also reduce the number of external resources needed for those currently struggling to get to the Food Bank, including having to use multiple modalities of transportation, and/or requiring Valley Lift services. It would also create additional engagement opportunities for those seeking to volunteer in the community.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 01/01/2023-12/31/2024 b. Administration & Fundraising expense: \$ _____ %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990, Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 506,341

d. Total expenses: \$ 506,341

e. Sources of revenue:

Memberships/ individual contributions	\$ <u>621,096</u>	<u>96</u> %
Raised through fundraising activities	\$ _____	_____ %
Government	\$ _____	_____ %
Foundations	\$ _____	_____ %
United Way	\$ _____	_____ %
Fees for Service	\$ _____	_____ %
Other (reimbursements, payments, bequests, etc.)	\$ <u>27,103</u>	<u>4</u> %

f. Total revenue: \$ 648,199

2. What is the highest level of financial reporting required by your funders?

Balance sheet, Profit and Loss Statement, program budget

3. Briefly describe your sustainability outlook for the project/program in the future.

We will continue to train volunteers and operate the program with minimal staff oversight/support. For food and supply purchasing, we will utilize general operating funds and offset with grant and foundation support.

4. a. Total organizational annual budget **current ongoing** fiscal year: 619,341

b. Total program/project budget current ongoing fiscal year: 98,303

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Ashland Community Food Bank * January 1, 2026-December 31, 2027

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify)	\$ 620,000	\$
SUB TOTALS	\$ 620,000	\$
TOTAL REVENUE (Pending & Secured)		\$ 620,000
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 217,200
Total Benefits		\$ 4,800
		\$
TOTAL PERSONNEL SERVICES		\$ 222,000
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Food purchases		\$ 250,625
Depreciation		\$ 12,552
Insurance		\$ 20,588
Utilities		\$ 15,600
Vehicle		\$ 10,800
Other expenses		\$ 41,261
TOTAL MATERIALS & SERVICES		\$ 309,341
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 618,341

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Ashland Community Food Bank * January 1, 2026-December 31, 2027

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify)	\$ 6,000 + General operating	\$ 16,000
SUB TOTALS	\$	\$
TOTAL REVENUE (Pending & Secured)		\$
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 16,000
Total Benefits		\$
		\$
TOTAL PERSONNEL SERVICES		\$
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Utilities		\$ 2,652
Vehicle and fuel		\$ 1,836
		\$
Food purchases		\$ 42, 606.25
Other expenses		\$ 7,014.37
Insurance and background checks		\$ 1,870
TOTAL MATERIALS & SERVICES		\$
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 71, 978.82

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

I.		# Whole Program	# Ashland
Gender	Female	258	230
	Male	264	235
II.	Other	2846 * prefer not to say	2533 * prefer not to say
	Totals	3,375 total	2,998 total
Age*			
0 to 5		_____	_____
6 to 12		_____	_____
13 to 17		_____	_____
18 to 30		_____	_____ Under 18: 669
31 to 40		_____	_____ Between 18-62: 1952
41 to 50		_____	_____
51 to 61		_____	_____
62 +		_____	579
Unknown		_____	3,200
Total		_____	_____

*at point of entry for service

*175 not reported

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland	**We do not collect this information
White	_____	_____	_____	
Black/African American	_____	_____	_____	
American Indian/Alaskan Native	_____	_____	_____	
Native Hawaiian/other Pacific Islander	_____	_____	_____	
American Indian/Alaskan Native and White	_____	_____	_____	
Black/African American and White American	_____	_____	_____	
Indian/Alaskan Native and Black/African American	_____	_____	_____	
Other Multi Racial	_____	_____	_____	
Other	_____	_____	_____	
Totals	_____	_____	_____	

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Ashland Community Food Bank

PROGRAM/PROJECT TITLE Removing Transportation Barriers to Food Access in Ashland

1. Number of board members required in bylaws? Minimum 8 Maximum 12
2. Number of board members currently active? # Voting 9 Vacancies
3. Average percentage board meeting attendance (over last completed year): 95 %
4. Percent of board in attendance required for a quorum: 66 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Executive	<u>4</u>
Governance	<u>3</u>
Facilities	<u>3</u>
Finance	<u>4</u>

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	<u>7</u>	<u> </u>
Black/African American	<u> </u>	<u> </u>
American Indian/Alaskan Native	<u> </u>	<u> </u>
Native Hawaiian/other Pacific Islander	<u> </u>	<u> </u>
American Indian/Alaskan Native and White	<u> </u>	<u> </u>
Black/African American and White	<u> </u>	<u> </u>
American Indian/Alaskan Native and Black/African American	<u> </u>	<u> </u>
Other Multi Racial	<u>2</u>	<u>2</u>
Other	<u> </u>	<u> </u>
Totals	<u>9</u>	<u>2</u>

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.



2026 Board of Directors Roster

- Elections to take place in early 2026, appointment of chairs may differ based on results.

Name	Professional Experience
Denise Deneaux	Retired Teacher and Executive Assistant
Pam Lucas <i>Board Treasurer</i>	Retired, Business Manager, Ashland School District
Elva Manquera-DeShields	Science Communications, Outreach, and DEI Manager - Klamath Bird Observatory
Natalie Mettler	Senior Services Superintendent, Senior Services Division, Ashland Park & Rec
Stef Seffinger <i>Board President</i>	Independent Artist Former Ashland Parks and Recreation Commissioner; Former Ashland City Council
Joyce Van Anne	Retired Early Education Specialist
Richard Spencer <i>Board Secretary</i>	Retired - Marketing/Communication
Sara Koenig	Retired National Park Service Biologist
John Wallar <i>Board Vice President</i>	Retired Business owner; Facilities management
Pam Greenwood	Retired US Forest Service and Law Enforcement; 27 years with US Forest Service

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

MAR 07 2006

ASHLAND EMERGENCY FOOD BANK
1135 VILLAGE GREEN DR
ASHLAND, OR 97520-0000

Employer Identification Number:

[REDACTED]

DLN:

[REDACTED]

Contact Person:

EDWINA O PERKINS

ID# 31229

Contact Telephone Number:

(877) 829-5500

Public Charity Status:

509(a)(2)

Dear Applicant:

Our letter dated March 2002, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity, rather than as a private foundation, during an advance ruling period.

Based on the information you submitted, you are classified as a public charity under the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at www.irs.gov.

If you have general questions about exempt organizations, please call our toll-free number shown in the heading.

Please keep this letter in your permanent records.

Sincerely yours,



Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Letter 1050 (DO/CG)

Balance Sheet Comparison - YTD

Ashland Emergency Food Bank

As of December 31, 2025

DISTRIBUTION ACCOUNT	TOTAL			
	AS OF DECEMBER 31, 2025	AS OF DECEMBER 31, 2024 (PY)	\$ CHANGE (PY)	% CHANGE (PY)
Assets				
Current Assets				
Bank Accounts				
Edward Jones Account	35.20	35.20	0.00	0.0 %
Key Bank Checking	287,034.25	291,729.20	-4,694.95	-1.61 %
Key Bank Savings 2408	265,669.28	88,169.28	177,500.00	201.32 %
Rogue Credit Union 3258	118,383.96		118,383.96	
Rogue Credit Union Money Market 3232	115,000.00		115,000.00	
Total for Bank Accounts	\$786,122.69	\$379,933.68	\$406,189.01	106.91 %
Accounts Receivable				
Other Current Assets	\$827,500.85	\$801,209.35	\$26,291.50	3.28 %
Total for Current Assets	\$1,613,623.54	\$1,181,143.03	\$432,480.51	36.62 %
Fixed Assets	\$411,855.00	\$424,410.00	-\$12,555.00	-2.96 %
Other Assets	\$67,273.89	\$53,081.00	\$14,192.89	26.74 %
Total for Assets	\$2,092,752.43	\$1,658,634.03	\$434,118.40	26.17 %
Liabilities and Equity				
Liabilities				
Current Liabilities	\$34,002.03	\$20,431.53	\$13,570.50	66.42 %
Long-term Liabilities				
Total for Liabilities	\$34,002.03	\$20,431.53	\$13,570.50	66.42 %
Equity				
Net Assets	1,579,664.43	1,466,095.04	113,569.39	7.75 %
Net Income	419,032.91	141,857.84	277,175.07	195.39 %
Grant/Fund Balances				
Anna May Foundation Grant	1,293.55	0.00	1,293.55	
Ashland Com Health-Outreach	6,462.33	0.00	6,462.33	
Ashland Co-op Grant	0.00	4,000.00	-4,000.00	-100.0 %
Ashland Co-op Restricted Diet G	254.54	254.54	0.00	0.0 %
CareOregon Grant	\$0.00	\$358.83	-\$358.83	-100.0 %
Carpenter Grant	4,118.50	0.00	4,118.50	
Chaney Grant	2,775.00	0.00	2,775.00	
Isaac Lindsay Fund	121.00	121.00	0.00	0.0 %
Marie Lamfrom Grant	24,998.00		24,998.00	
OR Community Foundation Grants	\$5,000.00	\$10,515.25	-\$5,515.25	-52.45 %
Roundhouse Foundation Grant Bal	13,114.38	15,000.00	-1,885.62	-12.57 %
Trinity Food/Produce Grant	1,915.76	0.00	1,915.76	
Total for Grant/Fund Balances	\$60,053.06	\$30,249.62	\$29,803.44	98.53 %
Total for Equity	\$2,058,750.40	\$1,638,202.50	\$420,547.90	25.67 %
Total for Liabilities and Equity	\$2,092,752.43	\$1,658,634.03	\$434,118.40	26.17 %

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Opportunities for Housing, Resources and Assistance **DATE:** 02/12/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) OHRA

ADDRESS PO Box 1133 Ashland OR 94520
Street **City** **State** **Zip**

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Ashland Community Housing Program

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Assistance to obtain and/or retain housing

AMOUNT REQUESTED from this funder for this program/project **2026-2027 \$** \$ 110,000

GRANT CONTACT (If other than Executive Director listed below)

Name

Telephone **E-mail**

EXECUTIVE DIRECTOR INFORMATION

Name Dan Cano

Telephone (541) 531-0669 **E-mail** danc@ohrahelps.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Catherine W. Gerbracht

Signature of Board President

Catherine Gerbracht

Type Name

Dan Cano

Signature of Executive Director/CEO

Dan Cano

Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

1. **Program/project is:** new ☐ established/continuing ☒
 pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
City of Ashland
3. What will this funding enable?
This funding will enable OHRA to deliver Ashland focused case management, navigation and housing support services that keep working families and vulnerable individuals housed, and link unhoused residents to services and housing supports.
4. Number of volunteers this program/project will engage: 10
Number of paid program employees this program/project will engage: 10
5. Total number volunteer's agency utilizes: 40
Total number of paid agency employees: 50
6. Outline key strategies of the project/program with timeline and staff structure.
OHRA's strategy is to carve out an Ashland focused program designed to best respond to the needs of unhoused and housing threatened Ashland residents.
The program will allocate a navigator who will leverage community resources, collaborations, and regional partnerships to access rent assistance, deposit assistance, and utility assistance. These activities have a direct and positive impact on getting or keeping Ashland residents housed.
OHRA will utilize The OHRA Center, which is the region's largest drop-in resource center and shelter. The Center is known to the community and key to helping at-risk residents access services from our 60+ agency partners including La Clinica, Maslow Project, DHS, and Jackson County Mental Health.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.
Our request is for \$110,000 of this we will use \$60,000 for a resource navigator's wages and benefits and \$50,000 for rent deposit, one-time rental assistance and/or utilities assistance.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Opportunities for Housing Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
- b. your organization's unique qualifications to accomplish your program outcomes?
- c. what approach is your agency taking to serve clients and train staff on trauma informed care?

2. What:

- a. issues(s) is the project/program intended to impact,
- b. strategy for change your program will be based on,
- c. evidence that the project/program will be successful in the proposed setting, and
- d. what tool(s) will you use to measure outcomes?

3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

Mission, Purpose and Program Fit: OHRA helps low-income people build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency. OHRA's purpose is embedded in our mission statement; we work with low-income people by building trusting relationships, we connect them to appropriate resources, through our Resource Center or our network of more than 60 partners to help them on a path so sustainability. The proposed program is a continuation of services and methods OHRA has provided since its inception. This program will pay for a navigator who is trained to establish relationships with the target population, and through supports and linkages to services the project offers hope, access, and movement toward sustainability. These funds will be used to support Ashland residents exclusively.

Approach: Resource navigators build trust and understanding with people who are unhoused, unstably housed, and who are guests visiting OHRA's resource centers. This trauma informed approach increases the navigator's influence on the community member to engage in services that address the immediate and longer-term challenges they face. OHRA's staff receive regular and up to date training on trauma informed practices through professional trainers and in-house mentoring.

Issues the project/program intended to impact: This program addresses all 4 challenges identified in Ashland's Strategic Plan for Social Services. These challenges include 1) providing more effective services options for high need individuals with challenging behaviors, 2) increasing services to vulnerable populations struggling with disabilities, mental health, or elder care; 3) increase housing supports/options for working families; and 4) linking families and individuals to transitional housing.

These challenges continue to be present in Ashland, and in many ways have increased. Over 75% of individuals who OHRA contacts at the Night Lawn and shelters have some co-occurring symptoms related to cognitive or mental health challenges. Working families continue to struggle to maintain affordable housing; and more seniors need rent assistance and support. We see this daily in our shelters and outreach programs.

Strategy for Change: Our service model is based on navigators building a trusting relationship with guests and assisting them to address personal, social, health, and other barriers to stability. OHRA's continuous development of strategic partners is also critical to keeping residents housed and linking guests to services.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance
PROGRAM/PROJECT TITLE Ashland Community Housing Program

Continue from previous page (if needed):

Evidence that the project/program will be successful: OHRA has delivered comprehensive social services to Ashland since 2014. Between 4/1/21 and 6/30/25, OHRA navigators helped 575 unhoused families (880 individuals including 121 children) find permanent housing and assisted 1,381 families threatened with eviction (2,944 individuals including 1,106 children) to remain housed.

By leveraging these funds to provide targeted and specialized services using proven strategies, OHRA will successfully keep or re-house a significant number of Ashland families and individuals and link unhoused residents to critical services.

Tool(s) to measure outcomes: OHRA uses the states' Homeless Management Information System to track engagement notes and progress, while program expense procedures document how and where funds are spent. Using these tools, OHRA will track and report the number of unhoused residents we house, the number of residents we help to stay housed, and the funds spent for emergency deposit, back-rent, and utility assistance.

We will also perform follow-up contacts at 6 and 12 months to determine the status of the households we assist and the number of other services delivered (e.g. life skills education, utilities assistance, referrals to other services).

Benefit to the community as a whole: In 2025, OHRA deepened its collaboration with the Ashland Police Department, leaders on the City Council, neighborhood leaders, and community advocates to increase coordination that has led to increased capacity and services for residents in crisis. However, OHRA's capacity to continue its work relies on financial support and partnerships with the City and its residents. By the city investing this funding in ORHA, we can continue to be a catalyst and resource hub for addressing our city's social services challenges.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Opportunities for Housing, Resources abd Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2022 -06/2023

b. Administration & Fundraising expense: \$ 372,901 15.8 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 1,991,802

d. **Total expenses:** \$ 2,364,703

e. Sources of **revenue**:

Memberships/ individual contributions \$ 0 %

Raised through fundraising activities \$ %

Government \$ 1,705,089 57.8 %

Foundations \$ 1,242,973 42.1 %

United Way \$ 0 %

Fees for Service \$ 0 %

Other (reimbursements, payments, bequests, etc.) \$ 2,880 0.1 %

f. **Total revenue:** \$ 2,950,942

2. What is the highest level of financial reporting required by your funders?
Federal single audit

3. Briefly describe your sustainability outlook for the project/program in the future.
OHRA will continue to leverage funds from the state, private foundations and private donors to maintain capacity. Critical to this is our fundraising and grant-writing infrastructure, which gives us the capacity to seek funding for successful programs. The City also has been a critical part of our sustainability as well, as we work closely with City Council and staff to partner on state and future federal grants to increase housing options for Ashland's most vulnerable.

4. a. Total organizational annual budget **current ongoing** fiscal year: 3,109,956

b. Total program/project budget current ongoing fiscal year: 1,456,798

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Opportunities for Housing Resources and Assistance

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$0	\$0
City of Ashland Funds	\$ 110,000	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$ 1,750,000	\$ 895,000
United Way Funds	\$ 0	\$ 0
Other Funds (Grants, gifts, carry-over)	\$ 1,200,000	\$ 200,000
SUB TOTALS	\$ 3,060,000	\$ 945,000
TOTAL REVENUE (Pending & Secured)		\$ 4,005,000
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$2,540,266
Total Benefits		\$216,882
TOTAL PERSONNEL SERVICES		\$2,757,147
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Barrier Reduction (Rent/utilities assistance, other guest assistance etc)		\$217,044
Shelter and Shower Trailer		\$605,072
Training		\$13,325
Outreach and Donor Communications		\$12,813
Accounting, Insurance and Board Expenses		\$182,450
Depreciation		\$211,654
TOTAL MATERIALS & SERVICES		\$1,242,357
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$0
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 3,999,505

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$ 0	\$ 0
City of Ashland Funds	\$ 110,000	\$
Jackson County Funds	\$ 0	\$ 0
CDBG (identify)	\$ 0	\$ 0
Other State or Federal Funds	\$ 380,000	\$ 895,000
United Way Funds	\$ 0	\$ 0
Other Funds (Grants, gifts and carry-over)	\$ 90,000	\$ 200,000
SUB TOTALS	\$ 580,000	\$ 915,000
TOTAL REVENUE (Pending & Secured)		\$ 1,495,000
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$1,027,893
Total Benefits		\$125,218
TOTAL PERSONNEL SERVICES		\$1,153,057
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Barrier Reduction (Rent/utilities assistance, other assistance etc.)		\$217,044
Training		\$3,075
Utilities		\$37,413
Supplies		\$64,179
Insurance		\$18,450
		\$
TOTAL MATERIALS & SERVICES		\$340,161
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$0
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 1,493,218

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

I.		# Whole Program	# Ashland
	Gender		
	Age*		
	Female	950	298
	Male	957	341
	Other	125	25
II.	Totals		
	0 to 5	142	49
	6 to 12	190	59
	13 to 17	124	47
	18 to 30	268	97
	31 to 40	382	128
	41 to 50	349	101
	51 to 61	292	98
	62 +	209	77
	Unknown	86	9
	Total	2042	665

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland
White	1445	132	485
Black/African American	62	1	28
American Indian/Alaskan Native	49	13	18
Native Hawaiian/other Pacific Islander	25	0	8
American Indian/Alaskan Native and White	45	5	7
Black/African American and White American	43	0	14
Indian/Alaskan Native and Black/African American	4	1	0
Other Multi Racial	223	183	73
Other	89	0	28
Totals	1985	335	662

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Opportunities for Housing, Resources and Assistance

PROGRAM/PROJECT TITLE Ashland Community Housing Program

1. Number of board members required in bylaws? Minimum 7 Maximum 17
2. Number of board members currently active? # Voting 13 Vacancies 0
3. Average percentage board meeting attendance (over last completed year): 90 %
4. Percent of board in attendance required for a quorum: 51 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Executive Committee	6+1 staff member
Finance Committee	4+1 staff member
Board Development and Governance Committee	4+1 staff member
Development Committee	5+1 staff member

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	11	1
Black/African American	_____	_____
American Indian/Alaskan Native	_____	_____
Native Hawaiian/other Pacific Islander	_____	_____
American Indian/Alaskan Native and White	_____	_____
Black/African American and White	1	_____
American Indian/Alaskan Native and Black/African American	_____	_____
Other Multi Racial	_____	_____
Other	_____	_____
Totals	12	1

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

There are 4 bi-lingual board members.

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Center for NonProfit Legal Services, Inc **DATE:** 2/9/2026

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 225 W Main St, Medford, OR 97501
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Removing Legal Barriers to Self Sufficiency

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Legal Aid to Remove Barriers to Housing

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ 15,000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Debra F. J. Lee

Telephone 541-779-7292 **E-mail** debralee@cnpls.net

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Colette Boehmer
Digitally signed by Colette Boehmer
Date: 2026.02.13 12:04:01 -08'00'
Signature of Board President

Colette Boehmer
Type Name

Debra F. J. Lee
Digitally signed by Debra F. J. Lee
Date: 2026.02.13 12:04:42 -08'00'
Signature of Executive Director/CEO

Debra F. J. Lee
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

1. Program/project is: new ☐ established/continuing ☒
 pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
for NonProfit Legal Services (CNPLS) requests funding to continue providing critical life-changing civil legal representation for elder and indigent residents of the City of Ashland
3. What will this funding enable?
This funding will allow CNPLS attorneys to remove legal barriers to fair, safe, and affordable housing, to access to income and health care for Ashland's veterans, seniors, disabled, and indigent residents at risk of homelessness. CNPLS' attorneys protect tenants' legal rights and access to health care and income through legal education, negotiation, administrative hearings and court representation. 
4. Number of volunteers this program/project will engage: 2
Number of paid program employees this program/project will engage: _____
5. Total number volunteer's agency utilizes: 10
Total number of paid agency employees: 15
6. Outline key strategies of the project/program with timeline and staff structure.
Funding this grant will support our ongoing mission to provide legal education, advocacy, and civil legal representation. Residents of the City of Ashland have been devastated by COVID isolation and loss of housing after the Alameda fire. Residents are only beginning to recover, and we anticipate increasing challenges for low-income residents now that the housing moratorium is lifted. Our proposal will protect non-discriminatory housing and help Ashland's most vulnerable citizens navigate the recovery process. We will complete this project within the year. Staff will include 0.25 FTE attorney time and .75 paralegal time.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1)a. The Center for NonProfit Legal Services (the Center) has provided free civil legal assistance to low-income persons and seniors residing in Jackson County since December 1972. Legal Services' mission is: "To secure justice for and protect the rights of needy persons residing in Jackson County so that such persons shall not by reason of being in financial need be denied equal protection under the law." Our attorneys focus their representation on the priority needs of marginalized, under-resourced individuals, individuals with certain intersecting identities, and the elderly in Jackson County. Our target populations are communities of Color and Marginalized Populations: the homeless, veterans, vulnerable aging, and people with disabilities. Using trauma-informed care principles, we work to engage, protect, and ensure that this population has access to resources that meet their basic needs for food, sustainable shelter, medical care, income maintenance, freedom from domestic violence in family matters, and citizenship enfranchisement through the naturalization process.

1. b.) CNPLS is uniquely qualified to accomplish our program outcomes as we are the only legal aid providers in Jackson County with Oregon licensed attorneys. Only Oregon licensed attorneys are permitted to give legal advice in Oregon law matters, such as housing and public benefits. This project is consistent with our mission and Ashland's Strategic Priorities. As we help Ashland's seniors and indigent residents' obtain/maintain affordable, safe, and secure housing, and remove barriers to public benefits we break the cycle of poverty. Secure housing and access to public benefits, including food and healthcare benefits, are the foundation for health and well-being, allowing citizens to be more productive and engaged with their community. Our attorneys specialize in poverty law, including housing, employment rights, public benefits, family law involving domestic violence and protective services, individual rights -Protecting our Veterans, and immigration law. Poverty law involves constantly changing laws, and our concentration allows for a high level of responsiveness and competence. Our attorneys are highly trained and experienced, with an 80% success rate.

1.c) Providing services using the principles of trauma-informed care is essential if we want to successfully work with indigent and senior members of our community. Staff receives training from online resources such as NCLER and community trainers like Jackson Care Connect. To prevent re-traumatizing clients, we have established a physically safe, respectful, and culturally competent environment. Staff seeks to be transparent and trustworthy as we teach our clients about the law, help them understand their rights, and provide legal options. The legal information we provide our clients gives them the knowledge to make informed choices in

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

Continue from previous page (if needed):

2. a) We propose to assist in obtaining/maintaining housing and accessing public benefits for Ashland's most vulnerable residents. Our housing attorney provides legal representation that protects affordable, safe, and fair housing. He conducts outreach at Project Community Connect and offers legal education presentations for our community partners and protected populations about fair housing laws. Our public benefits attorney assists seniors and indigent residents with acquiring benefits and overturning benefit denials. All of our attorneys concentrate their legal assistance on the elderly, disabled, and impoverished of Ashland. Our representation holds landlords accountable to the Oregon Landlord/Tenant Act (ORLTA). Our Executive Director serves as the Continuum of Care (CoC) board president and serves on the Housing and Community Development Commission (HCDC). We propose holding conversations with elected and appointed officials on finding solutions for the expanding housing crisis.

2 b) Our Removing Legal Barriers to Self-Sufficiency project is based on the Housing Strategy and Income and Poverty Strategy. We designed this project to provide legal representation to homeless, indigent, and senior Ashland residents who are experiencing legal barriers to safe, clean and affordable housing, and income, food and access to health care. CNPLS provides legal education, advocacy, advice and representation, empowering low-income households to become stable, independent, and self-sustaining. We work to protect and ensure that this often marginalized population obtains access to resources which allows them to meet their basic needs for food, sustainable shelter, medical care and income maintenance.

2 c) The Center for NonProfit Legal Services has served as the only source of civil legal assistance for low-income Ashland residents for over 50 years. Ashland residents make up about one quarter of our caseload. We provide legal education, advocacy, advice, and representation, empowering low-income households to become stable, adequately sheltered, and self-sustaining. We have a proven track record of providing successful resolutions for our clients.

2 d.) Using our case management system, Legal Server, we generate statistical reports each quarter that describe the number of clients served, client demographics, the level of service requested, and case disposition. This report tracks the results of our efforts within specific legal practice areas. Client satisfaction surveys and statistical reports are how we assess our success. In addition, we use this information to verify that we have met our outreach and representation goals.

3. Access to justice enfranchises the whole community. Civil legal aid levels the playing field by educating people to know their rights. It fulfills our nations' fundamental promise of justice for all-not for the few who can afford it. Our program partners with the Rogue Valley Council of Governments (RVCOG) to provide legal services to seniors experiencing problems with housing, Medicare/Medicaid, and SNAP benefits. In addition, we collaborate with Southern Oregon Rehabilitation Center and Clinics (SORCC) to help disabled and homeless veterans secure government benefits so they can maintain their independence.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2023-06/2024

b. Administration & Fundraising expense: \$ 159,896 14 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 982,218

d. **Total expenses:** \$ 1,142,114

e. Sources of **revenue:**

Memberships/ individual contributions	\$ <u>0</u>	<u> </u> %
Raised through fundraising activities	\$ <u>17,609</u>	<u>1.04</u> %
Government	\$ <u>1,062,326</u>	<u>62.65</u> %
Foundations	\$ <u>512,704</u>	<u>30.24</u> %
United Way	\$ <u>9,000</u>	<u>.53</u> %
Fees for Service	\$ <u>0</u>	<u> </u> %
Other (reimbursements, payments, bequests, etc.)	\$ <u>93,957</u>	<u>5.54</u> %

f. **Total revenue:** \$ 1,695,626

2. What is the highest level of financial reporting required by your funders?
Audit

3. Briefly describe your sustainability outlook for the project/program in the future.

We are taking a proactive approach to sustainability with our Partnership for Justice Campaign. We are working with our state partners to create new avenues of funding after Trump's cuts to funding. Our goal is to continue expanding our capacity to provide legal assistance to Ashland residents by building community support and our endowment fund. Our long-term focus is to expand our fund development capacity, building on our endowment fund and improving the energy efficiency of our building to reduce expenses to continue our work for justice.

4. a. Total organizational annual budget **current ongoing** fiscal year: \$ 1,567,482

b. Total program/project budget current ongoing fiscal year: \$ 65,000

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc.

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$ 16,500
City of Ashland Funds	\$ 15,000	\$
Jackson County Funds	\$	\$ 50,000
CDBG (identify) Medford	\$ 20,000	\$
Other State or Federal Funds	\$ 71,000	\$ 845,117
United Way Funds	\$	\$ 9,000
Other Funds (identify) OSB State/Foundations	\$ 300,100	\$ 240,765
SUB TOTALS	\$ 406,100	\$ 1,161,382
TOTAL REVENUE (Pending & Secured)		\$ 1,567,482
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 844,454
Total Benefits		\$ 153,917
TOTAL PERSONNEL SERVICES		\$ 998,371
B.MATERIALS & SERVICES: (please detail other major budget categories)		
General		\$ 144,200
Technology		\$ 7,000
Equipment/Supplies		\$ 40,000
Occupancy		\$ 360,011
Professional Expenses		\$ 17,400
		\$
TOTAL MATERIALS & SERVICES		\$ 569,111
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$
TOTAL EXPENDITURES (Sum of A, B & C) Total Expenditures = 1,567,482		\$

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$ 15,000	\$
Jackson County Funds	\$	\$ 1,600
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify)	\$ 8,400	\$ 40,000
SUB TOTALS	\$23,400	\$41,600
TOTAL REVENUE (Pending & Secured)		\$65,000
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 47,000
Total Benefits		\$ 5,173
TOTAL PERSONNEL SERVICES		\$52,173
B.MATERIALS & SERVICES: (please detail other major budget categories)		
General		\$ 5,944
Technology		\$ 1,400
Equipment/Supplies		\$ 1,595
Occupancy		\$ 3,528
Professional Expenses/Insurance		\$ 360
		\$
TOTAL MATERIALS & SERVICES		\$ 12,827
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$
TOTAL EXPENDITURES (Sum of A, B & C)		\$
Total Expenditures = \$65,000		

(Use absolute numbers only – no percentages.)

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

***at point of entry for service**

	<i>#Whole Program</i>	<i>Ethnicity Hispanic/Latino*</i>	<i># Ashland</i>
White	313		71
Black/African American	10		3
American Indian/Alaskan Native			9
Native Hawaiian/other Pacific Islander	1		
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial	80	80	12
Other	43		4
Totals	447	80	

8

Agency Board Profile

RECIPIENT AGENCY Center for NonProfit Legal Services, Inc

PROGRAM/PROJECT TITLE Removing Legal Barriers to Self Sufficiency

1. Number of board members required in bylaws? Minimum 5 Maximum 15
2. Number of board members currently active? # Voting 5 Vacancies
3. Average percentage board meeting attendance (over last completed year): 75 %
4. Percent of board in attendance required for a quorum: 51 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Personnel	3
Executive	3
Finance	4
Local Campaign for Equal Justice	7
Partnership for Justice	7

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	6	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	1	1
Totals	7	1

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

CENTER FOR NONPROFIT LEGAL SERVICES BOARD ROSTER

COLETTE BOEHMER
210 LAUREL STREET
MEDFORD, OR 97501
541-779-7552 PHONE
541-772-3374 FAX
cboehmerlaw@gmail.com
Member since 1990

JENNIFER NICHOLLS (TREASURER)
BROPHY MILLS SCHMOR GERKING
201 W MAIN ST. STE 5
MEDFORD OR 97501
541-772-7123 PHONE
541-772-7249 FAX
jnicholls@brophylegal.com
Member since 2017

LILIA CABALLERO (SECRETARY)
MEDFORD POLICE DEPARTMENT
411 W..8TH STREET
541-770-5770- PHONE
lilia.caballero@ci.medford.or.us
Member since 2013

COLIN M. MURPHY
SOUTHERN OREGON PUBLIC
DEFENDER, INC.
301 W. 6TH STREET
MEDFORD, OR 97501
541-779-5636 PHONE
colin@sopd.net
Member since 2024

KATELYN MASON
JAMES A. REDDEN
US COURT HOUSE
310 WEST 6TH STREET
MEDFORD, OR 97501
541-608-8770-PHONE
katelyn_mason@ord.uscourts.gov
Member since 2022

CHRISTINA H. RUBY
ATTORNEY AT LAW
260 JACKSON CREEK DRIVE
JACKSONVILLE, OR 97530
541 778-1647
christina.h.hayes@gmail.com
MEMBER SINCE 2017

SEAN TIPTON
ATTORNEY AT LAW
FROHNMAYER DEATHERAGE
2592 E. BARNETT RD,
MEDFORD, OR 97504
(541) 779-2333
tipton@fdfirm.com
Member since 2023

Internal Revenue Service

Department of the Treasury

District
Director

P.O. Box 2350 Los Angeles, Calif. 90053

Person to Contact:

L. BARRAGAN
Telephone Number:

(213) 894-2336
Refer Reply to:

EO (0406) 94
Date:

APR 07 1994

CENTER FOR NON PROFIT LEGAL
SERVICES
P.O. BOX 1586
MEDFORD, OR 97501-0266

RE: CENTER FOR NON PROFIT LEGAL SERVICES
EIN: [REDACTED]

Dear Taxpayer:

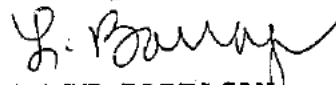
This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate that this organization was recognized to be exempt from Federal Income Tax in DECEMBER 1972 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in DECEMBER 1972 continues to be in effect.

If you need further assistance, please contact our office at the above address or telephone number.

Sincerely,



LUCILLE BARRAGAN
Disclosure Assistant

COMMUNITY WORKS
DOMESTIC VIOLENCE • SEXUAL ASSAULT • STALKING • TRAFFICKING
RESOURCE CENTER

2594 E. Barnett Road Suite C Medford, OR 97504

February 2, 2026

Linda Reid:

Community Works is seeking \$12,000 in financial assistance from the City of Ashland, Social Service Grant Program, for a portion of the budget for the Dunn House Shelter.

Attached in this application are the following documents:

- Agency Application
- Agency Board Roster
- Copy of 501 (c)(3) IRS Tax Exemption Letter
- Agency Financial Statement

Thank you and the City of Ashland for your consideration of our request.

Sincerely,



Barbara Johnson
Executive Director

*Community Works is here to bring
HOPE, SUPPORT, and EMPOWERMENT
to those impacted by violence.*

A 501(c)(3), non-profit, charitable corporation. Donations are tax-exempt to the extent permitted by the IRS code. No goods are provided in exchange for your contribution. Therefore, this gift may qualify for a tax deduction as allowable by law. Our Tax ID number is 93-0633804.

2025-2026 Board of Directors

Debbie McQueen, Chair

Stacy Owens, Development Chair

Jacquelyn Bunick

Brent Hackwell

Kevin Sanders, Vice-Chair

Lee Ayers

Doug Diehl

Melissa Markos

Goeff Boldt, Treasurer

Keyan Botsford

Vanessa Espino

Kylie Padget

Cathy Fultineer, Secretary

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Community Works **DATE:** 2/2/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 2594 E. Barnett Rd., Ste. C Medford, OR 97504
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Dunn House Shelter

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Assistance to obtain and/or maintain housing

AMOUNT REQUESTED from this funder for this program/project **2026-2027 \$** 12,000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Barbara Johnson, Executive Director

Telephone 541-779-2393 x202 **E-mail** bjohnson@community-works.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Debbie McQueen
Signature of Board President

Debbie McQueen, Board Chair
Type Name

Barbara Johnson
Signature of Executive Director/CEO

Barbara Johnson, Executive Director
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

1. **Program/project is:** new ☐ established/continuing ☒
 pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.)*

The Dunn House Shelter serves survivors who are homeless or at imminent risk of homelessness due to domestic violence, sexual assault, stalking, and human trafficking throughout Jackson County, Oregon, including residents of Ashland. For more than 50 years, the Dunn House Shelter has been the only emergency shelter in Jackson County specifically designated for survivors of interpersonal violence. Those who seek shelter at the Dunn House have no safe alternatives.
3. What will this funding enable?

This funding will support the operation of the low-barrier Dunn House Shelter and 24/7 HelpLine to access the shelter ensuring immediate safety for 250 survivors every year, half of whom are children. Staffed 24/7 by Community Works Certified Advocates trained in trauma-informed, services, the shelter fosters healing. Advocates provide housing advocacy to address barriers such as poor rental history or language access so survivors can transition to permanent, safe housing.
4. Number of volunteers this program/project will engage: 23
Number of paid program employees this program/project will engage: 9
5. Total number volunteer's agency utilizes: 35
Total number of paid agency employees: 39
6. Outline key strategies of the project/program with timeline and staff structure.

The Dunn House is a low-barrier shelter with Certified Advocates on site 24/7. It provides immediate safety and comprehensive supportive services to stabilize survivors and support their transition into safe and sustainable housing. Key strategies include trauma--informed support, provision of basic needs, and individualized safety planning. Community Works Housing Advocates meet with each resident and complete a housing needs assessment, identify and reduce housing barriers, support in navigating and obtaining housing, provide financial assistance for move-in costs, offer life skills education, and provide basic household items for newly housed survivors. Once in permanent housing, advocates continue providing life skills support and advocacy to promote housing stability and long-term success. The Dunn House is open year-round with a low staff-to-resident ratio that ensures individualized, timely support.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

The Dunn House Shelter is the first critical step in a survivor's path to safety, stability, and permanent housing. Dunn House provides the stability needed to begin working toward long-term housing and independence. In addition to operating the Dunn House Shelter, Community Works delivers comprehensive, wraparound services through staff embedded full-time within community systems, including DHS, the courthouse, law enforcement agencies, the Children's Advocacy Center, Community Justice, SOU, and Rogue Community College. Community Works has our own transitional housing and is building more to ensure survivors have access to dedicated housing paired with supportive services. Together, emergency shelter, transitional housing, system-based advocacy, and ongoing supportive services form an ecosystem of care. Each year, Community Works serves approximately 2,000 individuals in person and responds to more than 12,000 callers through our 24/7 crisis line.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a. Community Works mission is to bring hope, support, and empowerment to those impacted by violence. All individuals we serve are survivors of domestic violence, sexual assault, stalking, and/or human trafficking, and nearly all are homeless or at risk of homelessness as a direct result of the abuse they have experienced. Community Works was founded in 1996 through the merger of three organizations doing this work since the 1970's. Our purpose is to provide a comprehensive safety net for survivors by addressing immediate crisis and long-term stability, including crisis intervention, advocacy, and permanent housing. The Dunn House Shelter is central to our mission, offering immediate crisis intervention and safety through emergency shelter while also serving as the entry point to longer-term housing services and support.

1b. Community Works is recognized by the DOJ, DHS, and local systems as the only agency in Jackson County providing a full continuum of survivor specific services, including shelter, advocacy, and housing, for survivors in our community. Our programs are designed exclusively for survivors. All staff are Certified Advocates, required by Oregon statute, with the training and expertise to effectively support survivors.

1c. Community Works is deeply committed to survivor-centered care. All staff are required to complete the state Certified Advocate training which includes trauma-informed care, anti-oppression practices, and cultural responsiveness. Advocates apply this training by recognizing the impacts of complex trauma, prioritizing survivor autonomy, and providing individualized supportive services. This approach promotes healing, dignity, and empowerment while supporting survivors in achieving lasting safety and stability.

2a. Interpersonal violence remains a critical issue in Oregon, with more than one in three women having survived domestic violence and nearly half having survived sexual assault - both higher than national averages. These numbers are more staggering for those from marginalized communities. Domestic violence accounts for 70% of female homicides statewide. Jackson County is a hub of human trafficking - both sex and labor, and the rates of trafficking in our community have grown to a state of emergency. Domestic violence is a primary driver of homelessness. Women report domestic violence as the immediate cause of their homelessness 22-57% of the time, and 38% of domestic violence survivors experience homelessness at some point in their lives. Beyond housing instability, survivors face significant mental and physical health consequences that result in long-term trauma, chronic health conditions, and severe psychological harm. Without access to safe housing and trauma-informed support, survivors are at heightened risk of continued abuse, homelessness, and long-term instability.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

Continue from previous page (if needed):

2b. Community Works' strategy for change is grounded in a proven model: low-barrier, safe housing paired with comprehensive, survivor-centered advocacy services. Services are voluntary and survivor-led. This approach is essential to obtain housing and remaining housed. The Dunn House operates as a low-barrier shelter designed to rapidly rehouse survivors fleeing violence. There are no documentation, income, sobriety, or gender requirements, and the shelter is accessible 24/7 through Community Works HelpLine crisis line - a critical first step in accessing safety. While at the shelter, residents work closely with Community Works' housing advocates who assess clients' needs, goals, and barriers, then provide hands-on support navigating the affordable housing market and supporting survivors in obtaining housing stability.

To further strengthen outcomes, Community Works opened Mary's Haven two years ago - the first transitional housing for survivors in Jackson County. Mary's Haven provides housing for survivors leaving the Dunn House for up to two years coupled with on-site supportive services. Community Works has secured the land for additional housing and is actively expanding housing capacity to address the affordable housing crisis by creating safe, dedicated housing options for survivors in our community.

2c. The Dunn House Shelter maintains 100% occupancy, demonstrating the urgent need for survivor-specific housing. Community Works' model aligns with the evidence that shows housing first coupled with supportive services is critical to achieve and maintain housing. Staff are on-site 24/7 and continue providing services after survivors transition into long-term housing. Program success is measured by the number of people served, nights of shelter provided, safety plans, support and education group participation, basic needs assistance provided, and the percentage of residents who transition into and maintain safe housing.

2d. Client satisfaction and safety are assessed through confidential client feedback forms in the language of their choice to inform service improvements. Results are reviewed by the management team at least quarterly. In the last fiscal year, 99% of residents reported that services increased their knowledge of safety planning, helped them make informed decisions, and connected them with vital resources.

All client services are tracked in a secure database, Osnum, enabling outcome analysis and quarterly reporting to funders. This data-driven approach ensures accountability and continuous program improvement. Feedback from clients is a primary driver of program adjustments, with changes incorporated into the agency's three-year strategic plan or addressed immediately if urgent.

3. Domestic and sexual violence carry substantial costs for healthcare, law enforcement, employers, and social services. A stay for a resident at our Dunn House Shelter costs \$2,300 on average, a cost-effective alternative compared with the \$35,000 average annual cost of chronic homelessness, as domestic violence is named as the most common reason women become homeless. Our services reduce these public costs while increasing safety and stability.

Community Works collaborates closely with law enforcement, healthcare, DHS, housing providers, and the Jackson County Continuum of Care (CoC). As the only agency providing a full continuum of survivor specific services, our organization plays a central role in the local safety net and housing response system in our community. For over a decade, Community Works has partnered with all Jackson County law enforcement agencies on the Lethality Assessment Program (LAP), a nationally recognized, evidence-based model that reduces domestic violence homicides. Every officer is trained to contact Community Works through a dedicated 24/7 law enforcement line, answered by Certified Advocates at the Dunn House, ensuring immediate safety planning and access to emergency housing. Annually, LAP serves 400 high-risk victims, the majority of whom experienced strangulation, a leading precursor to homicide.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2023-06/2024

b. Administration & Fundraising expense: \$ 733,805 20 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 2,784,831

d. **Total expenses:** \$ 3,518,636

e. Sources of **revenue:**

Memberships/ individual contributions \$ 362,849 9 %

Raised through fundraising activities \$ 267,000 7 %

Government \$ 1,878,633 48 %

Foundations \$ 1,280,323 33 %

United Way \$ 10,000 less than 1 %

Fees for Service \$ 0 0 %

Other (reimbursements, payments, bequests, etc.) \$ 98,201 3 %

f. **Total revenue:** \$ 3,897,006

2. What is the highest level of financial reporting required by your funders?

Community Works is required to have a single audit, due to the federal funding amount received.

3. Briefly describe your sustainability outlook for the project/program in the future.

Community Works' sustainability outlook for the Dunn House Shelter is strong and well established. The shelter receives stable, non-competitive state and federal funding allocated annually through the Department of Justice, ensuring consistent baseline support for ongoing operations. In addition, committed local philanthropic partners contribute reliable annual funding, including the Hearts & Vines Foundation, which provides nearly 10% of the shelter's annual operating budget.

4. a. Total organizational annual budget **current ongoing** fiscal year: 3,447,818

b. Total program/project budget current ongoing fiscal year: 1,236,523

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Community Works

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$ 40,000	\$
City of Ashland Funds	\$ 12,000	\$
Jackson County Funds	\$	\$ 119,955
CDBG (identify)	\$	\$
Other State or Federal Funds	\$ 210,000	\$ 2,321,805
United Way Funds	\$ 10,000	\$
Other Funds (identify) Foundations & Donations	\$ 1,206,694	\$
SUB TOTALS	\$ 1,478,694	\$ 2,441,360
TOTAL REVENUE (Pending & Secured)		\$ 3,920,054
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 2,036,245
Total Benefits		\$ 399,428
TOTAL PERSONNEL SERVICES		\$ 2,435,673
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Travel & Training		\$ 25,238
Equipment & Supplies		\$ 59,690
Client Assistance (Essential Basic Needs, Groceries, Rental Assistance, Utilities)		\$ 299,793
Facilities, Communication, & Insurance		\$ 190,212
Contractual, Professional Services, & Other Expenses		\$ 437,212
Administrative		\$ 472,236
TOTAL MATERIALS & SERVICES		\$ 1,484,381
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$ 0
Furnishings		\$ 0
Other capital expenses /Identify:		\$ 0
TOTAL CAPITAL OUTLAY		\$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		\$

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Community Works

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$ 40,000	\$
City of Ashland Funds	\$ 12,000	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$ 903,771
United Way Funds	\$ 9,000	\$
Other Funds (identify): Foundations & Donations	\$ 271,752	\$
SUB TOTALS	\$ 332,752	\$ 903,771
TOTAL REVENUE (Pending & Secured)		\$ 1,236,523
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 699,777
Total Benefits		\$ 132,549
TOTAL PERSONNEL SERVICES		\$ 832,326
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Travel & Training		\$ 9,488
Equipment & Supplies		\$ 39,358
Client Assistance (Essential Basic Needs, Groceries, Rental Assistance, Utilities)		\$ 30,835
Facilities, Communication, & Insurance		\$ 78,450
Contractual, Professional Services, & Other Expenses		\$ 72,464
Administrative		\$ 173,602
TOTAL MATERIALS & SERVICES		\$ 404,197
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$ 0
Furnishings		\$ 0
Other capital expenses /Identify:		\$ 0
TOTAL CAPITAL OUTLAY		\$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		\$

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

I.		# Whole Program	# Ashland
Gender	Female	176	14
	Male	55	0
II.	Other	18	0
	Totals		
		50	2
		47	4
		21	3
		50	0
		39	1
		19	1
		15	3
		8	0
		0	0
		249	14

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland
White	181		10
Black/African American	18		4
American Indian/Alaskan Native	7		
Native Hawaiian/other Pacific Islander	4		
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial	7		
Other	32	32	
Totals	249	32	14

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

The totals for gender listed above are 249 for the Whole Program and 14 for the City of Ashland. The data provided is only for the Dunn House Shelter, and not for the entire Community Works agency.

Agency Board Profile

RECIPIENT AGENCY Community Works

PROGRAM/PROJECT TITLE Dunn House Shelter

1. Number of board members required in bylaws? Minimum 9 Maximum 17
2. Number of board members currently active? # Voting 13 Vacancies 0
3. Average percentage board meeting attendance (over last completed year): 66 %
4. Percent of board in attendance required for a quorum: 50 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Executive	5
Finance	6
Development	13

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	11	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	2	1
Totals	13	1

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

ROSTER

Board of Directors

FY 2025-2026

Barbara Johnson
541-821-8582

MEMBER NAME	ADDRESS/PHONE	TERM/COMMITTEE(S)
Debbie McQueen (Bob) BOARD CHAIR Retired Health Care	417 S. Central Valley Drive Central Point, OR 97502 (541) 821-0696 Bobdeb51@gmail.com	1st Term: 07/01/19-06/30/22 2nd Term: 07/01/22-06/30/25 Committees: Development, Executive Skills: Healthcare profession
Kevin Sanders (Terry) VICE BOARD CHAIR Operations Manager Corey Robbins Painting Company	PO Box 1242 Talent, OR 97540 (541) 951-1955 kevin@coreyrobbins.com	1st Term: 5/25/2016-06/30/2019 2nd Term: 7/1/19-06/30/22 Bylaw Extension: 7/1/22-06/30/26 Committees: Development, Executive Skills: Building and painting
Geoff Boldt TREASURER Oregon Pacific Wealth Management	2832 Rosemont Ave Medford, OR 97504 (541)890-8328 Geoff.Boldt@oregonpacificwealth.com	1st Term: 01/01/25-06/30/28 2nd Term: Committees: Skills: Economics, Finance
Cathy Fultineer (Rod McLeod) Consulting Chief Marketing Officer SECRETARY	2337 Hillside Drive Central Point, OR 97502 (541)261-5499 cathyjfultineer@gmail.com	1st Term: 07/01/20-06/30/23 2nd Term: 07/01/23-06/30/26 Committees: Development, Executive Skills: Business, marketing
Keyan Botsford Orthodontist/Business Owner Botsford Family Orthodontics	4006 Fieldbrook Avenue Medford, OR 97504 (925) 984-7223 keyanbotsford@gmail.com	1st Term: 2/01/23-6/30/26 2nd Term: Committees: Development Skills: Networking, community connections
Jacquelyn Bunick Attorney Jarvis, Dryer, Gilatte, & Larsen, LLP	2850 Shanteal Pl Medford, OR 97504 (217) 840-1521 jbunick@medfordlaw.net	1st Term: 1/08/20-6/30/23 2nd Term: 07/01/23-6/30/26 Committees: Development Skills: Legal
Doug Diehl (Patti) Doctor & Medical Administrator Retired	3938 Piedmont Terrace Medford, OR 97504 (541) 951-1295 (c) dreammd474@gmail.com	1st Term: 11/4/2020 – 06/30/2023 2nd Term: 07/01/23-06/30/26 Committees: Business Skills: Healthcare professional
Vanessa Espino Victim Advocate District Attorney Office	3306 S Pacific Highway #97 Medford, OR 97501 (541)944-4610 EspinoVI@jacksoncounty.org	1st Term: 10/01/22 – 06/30/2025 2nd Term: 07/01/25-6/30/2028 Committees: Business Skills: Advocacy, Customer Service

Brent Hackwell (Danielle) Chief Operating Officer KOGAP	P.O. Box 1117 Jacksonville, OR 97530 (541)941-1172 bvh@kogap.com	1st Term: 02/01/21-06/30/24 2nd Term: 07/01/24-06/30/27 <u>Committees:</u> Development <u>Skills:</u> Business and Construction
Melissa Markos (Gulielmo Brunese) Non-Profit Management ACCESS/Jackson County Continuum of Care	10 E South Stage Road SPC 308 Medford, OR 97501 (541)840-4016 mmarkos@accesshelps.org	1st Term: 06/01/25-06/30/28 2nd Term: <u>Committees:</u> <u>Skills:</u> Non-Profit Budget, Management, Grant Writing, Program, Fundraising, Leadership
Stacy Owens (Rich) Teacher, St. Mary's	890 Bybee Drive Jacksonville, OR 97530 (541)660-1774 Stacyownes0807@gmail.com	1st Term: 03/01/24-06/30/27 2nd Term: <u>Committees:</u> <u>Skills:</u> Program Management, Problem Solving, Time Management & Training8
Kylie Padget Pelvic Floor Physical Therapist, Asante	1239 Shafer Lane Medford, OR 97501 (541)993-5248 Kylie.padget@gmail.com	1st Term: 05/01/25-06/30/28 2nd Term: <u>Committees:</u> <u>Skills:</u> Healthcare and fundraising
Lee Ayers Preboski Education – Criminologist, Emeritus Faculty SOU	900 Butler Creek Road Ashland, OR 97520 (541)821-1508 ayersL@sou.edu	1st Term: 11/01/25-06/30/28 2nd Term: <u>Committees:</u> <u>Skills:</u> Policy, Analysis, Grant Writing, Strategic Planning,

Internal Revenue Service

Department of the Treasury

District
Director

300 N. Los Angeles Street, MS 7043
Los Angeles, CA 90012

COMMUNITY WORKS, INC.
900 E MAIN STREET
MEDFORD, OR 97504-7136

Person to Contact:
L BARRAGAN
Telephone Number:
(213) 894-2336
Refer Reply to:
EO(0407)98
Date:
APRIL 15, 1998
EIN: [REDACTED]

Dear Taxpayer:

This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate this organization was recognized to be exempt from Federal Income Tax in FEBRUARY 1982 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the Code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in FEBRUARY 1982 continues to be in effect.

If you need further assistance, please contact our office at the above address or telephone number.

Sincerely,



Disclosure Assistant

Community Works

Balance Sheet

Community Works - 2024/2025

	Jun - 25	May - 25	Jun - 24
Assets			
Current Assets			
Cash	1,013,440	1,131,983	883,887
Investments	1,384,542	1,365,398	1,293,147
Accounts Receivables	496,584	374,955	361,564
Promises to Give	180,800	195,828	180,376
Other Current Assets	12,114	11,350	29,561
Total Current Assets	3,087,479	3,079,514	2,748,536
Fixed Assets			
Land	53,208	53,208	53,208
Buildings	523,813	523,813	523,813
Equipment	64,670	64,670	64,670
Furniture & Fixtures	30,121	30,121	30,121
Construction in Progress	4,505	4,505	1,482,663
Accumulated Depreciation	(506,216)	(504,416)	(483,065)
Total Fixed Assets	170,101	171,901	1,671,411
Other Long Term Assets			
Endowment Fund Held in Perpetuity	5,000	5,000	5,000
ROU Assets - Operating Leases	193,270	199,790	251,187
Total Other Long Term Assets	198,270	204,790	256,187
Total Assets	3,455,850	3,456,205	4,676,133
Liabilities & Fund Balance			
Current Liabilities			
Accounts Payable	36,539	32,983	65,977
Payroll Liabilities	151,783	157,799	146,447
Deferred Revenues	367,279	425,410	285,269
ROU Current Liabilities - Operating Leases	81,588	74,226	69,617
Other Current Liabilities	400	0	(25)
Total Current Liabilities	637,589	690,417	567,285
Long Term Liabilities			
ROU Long-Term Liabilities - Operating Leases	118,060	131,937	187,363
Total Long Term Liabilities	118,060	131,937	187,363
Fund Balance			
Fund Balance	2,700,200	2,633,850	3,921,486
Total Fund Balance	2,700,200	2,633,850	3,921,486
Total Liabilities & Fund Balance	3,455,850	3,456,205	4,676,133

Community Works

Income Statement

Community Works - 2024/2025

	Agency Jul 24 - Jun 25	2024/2025 Budget	% of Budget	FYE 2023/2024 Actual
Revenue				
Government Revenue	2,824,352	2,874,240	98%	2,600,910
Foundation Revenue	135,101	457,333	30%	406,731
Development Revenue	787,578	402,630	196%	854,326
Misc. Revenue	162			
Total Revenue	3,747,193	3,734,203	100%	3,861,968
Expenses				
Personnel	2,072,035	2,096,424	99%	1,936,736
Fringe Benefits	363,233	391,261	93%	332,187
Travel & Training	24,354	27,600	88%	37,967
Equipment	2,636			
Supplies	63,456	28,680	221%	39,682
Groceries	13,190	8,000	165%	16,314
Contractual	12,970	18,764	69%	13,093
Client Assistance	365,840	296,592	123%	521,016
Facilities	174,600	181,020	96%	174,042
Insurance	24,376	24,573	99%	19,666
Professional Services	258,982	163,000	159%	181,062
Other Expenses	87,006	89,400	97%	162,200
Admin Allocation				
Total Expenses	3,462,677	3,325,314	104%	3,433,965
Net Operating Income	284,515	408,889	70%	428,003
Other Income and Expenses				
Depreciation Expense	(23,152)	(27,450)	84%	(24,702)
Investment Revenue	115,185			129,147
Bank & Investment Fees	(15,433)	(12,000)	129%	(16,252)
Net Assets Released from Restrictions				(97,300)
Total Other Income and Expenses	76,601	(39,450)	(194%)	(9,106)
NET SURPLUS/(DEFICIT)	361,116	369,439	98%	418,897

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING
AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL
STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

To the Board of Directors
Community Works, Inc.
Medford, OR 97504

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*), the consolidated financial statements of Community Works, Inc. (the Organization), which comprise the Organization's consolidated statement of financial position as of June 30, 2025 and the related consolidated statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the consolidated financial statements (collectively, the financial statements), and have issued our report thereon dated December 3, 2025.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Organization's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Sorren CPAs P.C.

Sorren CPAs P.C.
Medford, Oregon
December 3, 2025

INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE

To the Board of Directors
Community Works, Inc.
Medford, OR 97504

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited Community Works, Inc.'s (the Organization) compliance with the types of compliance requirements identified as subject to audit in the *OMB Compliance Supplement* that could have a direct and material effect on each of the Organization's major federal programs for the year ended June 30, 2025. The Organization's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, Community Works, Inc. complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal program for the year ended June 30, 2025.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the Organization's compliance with the compliance requirements referred to above

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the Organization's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Organization's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Organization's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Organization's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the Organization's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Sorren CPAs P.C.

Sorren CPAs P.C.
Medford, Oregon
December 3, 2025

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Jackson County SART **DATE:** 02/13/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 2305 Ashland Street #104-418 Ashland OR 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Survivor Care Program

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Access to housing/mental health/substance use services

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ \$ 12,000

GRANT CONTACT (If other than Executive Director listed below)

Name Judith Rosen

Telephone (541) 840-8063 **E-mail** development@jacksoncountysart.org

EXECUTIVE DIRECTOR INFORMATION

Name Ava Derosier

Telephone (541) 951-4250 **E-mail** ava@jacksoncountysart.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Maylee Oddo
Digitally signed by Maylee Oddo
Date: 2026.02.13 13:24:11 -08'00'
Signature of Board President

Maylee Oddo
Type Name

Ava DeRosier
Digitally signed by Ava DeRosier
Date: 2026.02.13 13:24:44 -08'00'
Signature of Executive Director/CEO

Ava DeRosier
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

1. Program/project is: new ☐ established/continuing ☒
pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.)*
Adult and youth survivors (15+) of sexual assault and domestic/intimate partner violence (DV/IPV) in Ashland.
The project will also train 110+ Ashland medical, law enforcement, emergency rescue and social service personnel on survivor-centered and trauma-informed responses to this population.
3. What will this funding enable?
Funding will help sustain our core services for immediate and ongoing survivor care. Medical staff/first responder trainings will focus on our recent expansion into DV immediate care, which meets a longstanding need in our area.
4. Number of volunteers this program/project will engage: 2
Number of paid program employees this program/project will engage: 17
5. Total number volunteer's agency utilizes: 5
Total number of paid agency employees: 20
6. Outline key strategies of the project/program with timeline and staff structure.
Our program works to relieve the destructive mental, physical and financial impact of gender violence and help survivors heal. Specially-trained Forensic Nurse Examiners (FNEs) help them stabilize, connect them to advocacy and inform them about options and resources; our Resource Specialist secures aftercare services like stable housing and behavioral health care vital to their long-term recovery. Extensive partner collaborations pool resources and coordinate care. In-house trainings keep staff abreast of current best practices and survivors' medical/cultural/social service needs; community trainings help build a more knowledgeable, trauma-informed response to these survivors, especially across first response/medical/social service fields Our program is fully-developed and staffed and our expansion opened fully this January. Our Program Manager supervises our 15 on-call nurses and oversees their training and continuing education. +
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.
 - a. Please note that each Ashland person served often receives multiple dozens of hours of aid and ongoing support, especially those needing to secure safe (scarce) affordable housing and/or behavioral health care.
 - b. Like many small nonprofits, we use the cash basis method of accounting and are primarily grant-funded. As a result, our records do swing between deficit and surplus depending on the time of year grants come in: (-\$70,341) in 2022, when our early costs were covered by substantial grants received in late 2021, which had a \$184,686.89 surplus; a net gain of \$96,476 in 2023; (-\$54,630) in 2024, the year covered in General Financial Info; and a \$5,030.69 gain in 2025.
 - c. Org and Program Budget pages did not enable final expenditure totals (\$699,399; \$390,495)

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a. Founded in 2004, Jackson County SART works to ensure an effective, compassionate and collaborative response to sexual and domestic violence that prioritizes survivors' needs and to prevent this violence through community engagement and change. Our project furthers our mission by strengthening our best-practice care, solidifying its expansion to DV/IPV survivors and training community partners in trauma-informed response.

1b. United Way's Executive Director, Dee Anne Everson, calls ours "the most respected sexual assault response team in our state." The forensic nurses who staff our immediate medical response are state-trained and certified in responding to the physical and psychological effects of sexual assault and domestic violence and in caring for vulnerable/underserved populations. Our Resource Specialist is an experienced advocate with extensive expertise in crime victims' rights and affordable housing/behavioral health resources. She helps survivors navigate complex, often-fragmented support systems to access the services they need.

1c. We have long led efforts to understand trauma's impacts and to promote trauma-informed practices in our state. (In introducing her bill to mandate trauma-informed training for law enforcement (HB 2575), OR Representative Pam Marsh credited our work as her inspiration.) We conduct local and regional trainings on the neurobiology of trauma and the importance of trauma-informed care; we also train our own staff regularly and integrate this knowledge into all our policies, procedures and survivor interactions.

2a. Emergency departments are often the first – and sometimes the only – contact that survivors of domestic violence have with the healthcare system. Studies suggest that up to 38% of female emergency patients have experienced domestic abuse within the past year. Yet staff tend to focus solely on treating immediate injuries, without addressing or even recognizing their underlying cause – or patients' equally urgent psychological and social needs. "They patched me up," one survivor told us. "But that was it. I swore I'd never go back."

These missed opportunities have left patients in danger.

Like rape-related trauma, the trauma that DV survivors experience increases their risk of long-term mental and physical harm. Non-lethal strangulation occurs in 38% of DV incidents and, while it often leaves no visible marks, can prove deadly if not recognized and treated. And harm often escalates: DV has been linked to 69% of female homicides in Oregon.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

Continue from previous page (if needed):

Furthermore, as offenders generally prey on the vulnerable, many survivors have already-existing trauma and complex needs that must be addressed before they can begin to heal. About 80% of the DV and sexual assault survivors we serve live on low-incomes. Half are unhoused or housing unstable. Roughly 30% have coexisting, often previously undiagnosed mental health issues, and 40% have a drug/alcohol dependency. Few have the resources to cope with recovery on their own.

2b. Studies show that survivors who receive a compassionate, comprehensive, trauma-informed first response are significantly less likely to suffer long-term psychological and physical harm. Survivors tell us repeatedly that our nurses, unlike traditionally-trained medical staff, lessened their sense of isolation and shame and helped them understand both the trauma they were experiencing and their rights and options regarding their cases and their care. Many say our response restored a sense of trust and control, increasing their willingness to seek further services like follow-up care -- a key predictor of future well-being. For DV survivors not ready or able to leave their abuser -- it takes seven attempts on average -- a knowledge of options and resources can offer a crucial future lifeline.

Many DV survivors need resources like a safe place to stay before they can leave. We know that resource availability is not the same as access; traumatized survivors seldom have the mental and emotional bandwidth to navigate complex bureaucracies to find the help they need. So our first response serves as an on-ramp, not an end-point; a connection to advocacy and partners' existing DV services, free medical follow-up and our Resource Specialist for ongoing aid.

2c. For over 20 years we have provided free, immediate care, forensic evidence collection and resource connection to all sexual assault survivors requesting it. 100% of survey respondents say our care helped them make informed choices about their situation and path forward; 98% say our Resource Specialist helped them get the follow-up care and services they needed. DV responses are too small yet to be statistically significant, but look promising so far.

2d. We regularly document service outcomes using survivor surveys, Program Manager debriefs of cases and her program operations reviews, We also survey our training participants. Our Medical Consultant reviews program policies, procedures and case response. as well.

3. Our program:

- Can reduce long-term physical, psychological and financial harms for a large part of our community. Sexual violence impacts half of all women and 1 in 3 men; for DV it's 1 in 3 and 1 in 4 respectively (CDC). Rates for LGBTQIA+, BIPOC and disability communities are even higher.
- Reduces community costs of violence-related substance use, job loss, mental/physical health issues.
- Increases general public safety. Over half of all mass shootings involve domestic violence.
- Helps extend partner agencies' strengths and increase survivors' access to resources and support by integrating our services with others'. Community Works provides advocates for our sexual assault response; we connect DV survivors to their shelter; our Resource Specialist's focus on time-consuming social services navigation lets their advocates concentrate on crucial emotional support. We coordinate case management and share resources with health /behavioral health clinics, drug and alcohol service agencies and agencies working with the unhoused. Agencies often split housing costs with us for clients, helping our Resource Specialist secure safe, permanent housing for 20+ low-income Ashland survivors a year.
- Increases trust in public systems (healthcare, law enforcement, justice) and community engagement with them. We doubled sexual assault survivors' reporting rates to police within four years of our original program's start.
- Supports the legal process with expert evidence collection, documentation and trial testimony.
- Can help create a more uniform, cohesive and knowledgeable response to trauma among first responder, hospital and social services staff.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 01/2024 - 12/2024

b. Administration & Fundraising expense: \$ 171,824 25 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 526,540

d. **Total expenses:** \$ 698,364

e. Sources of **revenue**:

Memberships/ individual contributions	\$ <u>100,570</u>	<u>16</u> %
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Raised through fundraising activities	\$ _____	_____ %
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Government	\$ <u>185,640</u>	<u>29</u> %
------------	-------------------	-------------

Foundations	\$ <u>242,234</u>	<u>37</u> %
-------------	-------------------	-------------

United Way	\$ <u>15,000</u>	<u>2</u> %
------------	------------------	------------

Fees for Service	\$ <u>100,290</u>	<u>16</u> %
------------------	-------------------	-------------

Other (reimbursements, payments, bequests, etc.)	\$ _____	_____ %
--	----------	---------

f. **Total revenue:** \$ 643,734

2. What is the highest level of financial reporting required by your funders?
Financial statement plus 990

3. Briefly describe your sustainability outlook for the project/program in the future.

Federal/state cuts were a challenge. We have scaled back our in-school prevention work to reduce costs and stabilize our Survivor Care Program; we secured funding from multiple new foundation partners; and we increased individual donations. Fortunately we have healthy reserves and can count roughly \$328K in service fees (from hospitals, not survivors), hospital foundation support and recurring donations as highly likely income. Needless to say, your support is especially crucial this year.

4. a. Total organizational annual budget **current ongoing** fiscal year: 717,750

b. Total program/project budget current ongoing fiscal year: 390,474

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Jackson County SART

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$ 12,000	\$
Jackson County Funds	\$ 7,000	\$ 7,000
CDBG (identify)	\$	\$
Other State or Federal Funds	\$ 32,100	\$ 46,405
United Way Funds	\$ 15,000	\$
Other Funds (identify) Fndn, donor, program income	\$ 579,834	\$
SUB TOTALS	\$ 645,934	\$ 53,405
TOTAL REVENUE (Pending & Secured)		\$699,339
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 492,382
Total Benefits		\$ 104,858
TOTAL PERSONNEL SERVICES		\$597,240
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Insurance, accounting		\$ 25,500
Continuing ed, certification/registration, professional fees/dues, FNE supplies		\$ 10,150
Communication costs, website, Osnum data management, FNE secure platform		\$ 7,800
Office rent/utilities, supplies, phones, postage, PO		\$ 31,852
Community outreach, translation, fundraising		\$ 12,297
Client assistance		\$ 12,000
TOTAL MATERIALS & SERVICES		\$ 99,599
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$ 2,500
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 2,500
TOTAL EXPENDITURES (Sum of A, B & C)		\$

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Jackson County SART

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$ 12,000	\$
Jackson County Funds	\$ 7,000	\$ 7,000
CDBG (identify)	\$	\$
Other State or Federal Funds	\$ 32,100	\$ 46,405
United Way Funds	\$ 15,000	\$
Other Funds (identify) Fdn, donor, program income	\$ 270,990	\$
SUB TOTALS	\$ 337,090	\$ 53,405
TOTAL REVENUE (Pending & Secured)		\$390,495
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 301,314
Total Benefits		\$ 51,971
TOTAL PERSONNEL SERVICES		\$ 353,285
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Continuing education/training, certification, Medical Director		\$ 5,650
Malpractice insurance, 24/7 answering service, med supplies, FNE communication platform		\$ 6,950
Office rent/utilities, Osnium data system		\$ 9,150
Staff cell phones, mileage		\$ 2,460
Client assistance		\$ 12,000
		\$
TOTAL MATERIALS & SERVICES		\$ 36,210
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$ 1,000
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 1,000
TOTAL EXPENDITURES (Sum of A, B & C)		\$

(Use absolute numbers only – no percentages.)

PROGRAM/PROJECT TITLE	Survivor Care Program
------------------------------	-----------------------

***at point of entry for service**

	<i>#Whole Program</i>	<i>Ethnicity Hispanic/Latino*</i>	<i># Ashland</i>
White	270	39/ 9	54
Black/African American	4		2
American Indian/Alaskan Native	2		1
Native Hawaiian/other Pacific Islander	4		
American Indian/Alaskan Native and White			1
Black/African American and White American			
Indian/Alaskan Native and			
Black/African American			
Other Multi Racial	4		1
Other	49		2
Totals	333	39/ 9	61

Other Multi Racial = Asian
Other = Not Reported

Agency Board Profile

RECIPIENT AGENCY Jackson County SART

PROGRAM/PROJECT TITLE Survivor Care Program

1. Number of board members required in bylaws? Minimum 5 Maximum 11
2. Number of board members currently active? # Voting 5 Vacancies 0
3. Average percentage board meeting attendance (over last completed year): 80 %
4. Percent of board in attendance required for a quorum: 50 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Financial	2
Board Development	2 (1 + Ex Director)
Compliance/legal	2
Executive	3 (2 + Ex Director)

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	4	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	1	
Totals	5	

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.



Board of Directors

Maylee Oddo – Board President

Ashland, OR: (800) 523-6961, maylee@hycomb.com

Joined: 2012

Maylee Oddo is CEO for Hycomb LLC and served as Board President and Festival Director for the Ashland Independent Film Festival.

Alan Binette

Medford, OR: (541) 773-3018, abinettemd@hikerdoc.com

Joined: 2017

Alan Binette is a noted OB/GYN, retired, with a longstanding interest in nonprofit work.

Stefanie L. Burke

Medford, OR: (541) 779-8900, SLB@roguelaw.com

Joined: 2020

Stefanie Burke, an attorney with Hornecker Cowling LLP, specializes in Family Law Mediation.

Angela Eastman

Longmont, CO: angela.eastman@asante.org

Joined 2025

Angela Eastman is a Supervisor and Associate General Counsel for Asante Health System.

Michael Klein

Talent, OR: (503) 416-4771, michaelklein0525@gmail.com

Joined: 2021

Michael Klein (M.S.W.) is a Behavioral Health Provider at Ashland High School.

Hans Stroo

Ashland, OR: (541) 301-3583, hans@strooconsulting.com

Joined 2025

Hans Stroo (PhD) is a retired environmental scientist and researcher.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 29 2004

JACKSON COUNTY SART
C/O SUSAN MOEN
43 MORNINGLIGHT DR
ASHLAND, OR 97520

Employer Identification Number: +44 10 #

DLN: Doc. locator # for IRS

Contact Person:
EVELYN D GRIFFITHS ID# 31432

Contact Telephone Number:
(877) 829-5500

Accounting Period Ending:
December 31

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

Form 990 Required:
Yes

Effective Date of Exemption:
May 24, 2004

Contribution Deductibility:
Yes

Advance Ruling Ending Date:
December 31, 2008

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 1045 (DO/CG)



Department of the Treasury
Internal Revenue Service
EO Rulings and Agreements
P O BOX 2508
CINCINNATI OH 45201

Date of this notice: November 10, 2008
Notice Number: CP-158
Taxpayer Identification Number:
[REDACTED]

005804.507087.0028.001 1 AT 0.346 705

|||||

Advance Ruling Period Ending Date:
December 31, 2008



JACKSON COUNTY SART
% SUSAN MOEN
43 MORNINGLIGHT DR
ASHLAND OR 97520-3614436

For assistance, call:
1-877-829-5500

05804

Our records indicate that you were issued an advance ruling letter that treated you as a public charity, rather than a private foundation, during an advance ruling period that ends on the date indicated above. That letter required you to file IRS Form 8734 at the end of your advance ruling period to establish that you qualify as a public charity.

New IRS regulations changed the procedures governing your public charity status. You are no longer required to file Form 8734 at the end of the ruling period. The regulations also provide that donors can rely on your advance ruling letter with respect to your public charity status unless the IRS changes that status, based on the organization no longer meeting an applicable public support test, and publishes notice of the change.

If you have received Form 8734 from the IRS, please do not file it. Please keep your advance ruling letter along with this letter for your permanent records.

The regulations also changed the rules for computing public support, consistent with the redesigned Form 990, Return of Organization Exempt from Income Tax. For more information regarding those rules and the redesigned Form 990, please see the IRS website at www.irs.gov/eq.

2:34 PM

01/30/26

Cash Basis

Jackson County SART
Profit & Loss
 January through December 2025

	Jan - Dec 25
Ordinary Income/Expense	
Income	
Contribution	197,320.16
Fee for Service	82,774.60
Grants	455,330.85
Reimbursement	299.21
Savings Interest	4,436.10
Total Income	740,160.92
Gross Profit	740,160.92
Expense	
Administrative Expenses	
Accounting	8,362.62
Admin Insurance Expense	
Board Insurance	2,672.00
Worker's Comp Insurance	8,634.50
Total Admin Insurance Expense	11,306.50
Admin Office Rent	3,800.00
Bank Service Charges	-105.37
Fees & Dues	8,628.79
Fundraising	
Printing	2,137.66
Stamps	1,240.65
Total Fundraising	3,378.31
Internet	799.96
Meeting Expenses	890.31
Office Equipment	165.00
Outreach/Awareness	
Tabling supplies	194.42
Outreach/Awareness - Other	-500.00
Total Outreach/Awareness	-305.58
Personnel Appreciation	176.96
Personnel Expenses	299.00
Postage	75.17
Printing	5.00
Supplies	
Office	464.29
Supplies - Other	1,533.72
Total Supplies	1,998.01
Telephone	
Admin Phones	360.00
Telephone - Other	928.47
Total Telephone	1,288.47
Training Fees	
Continuing Education	2,049.40
Training Fees - Other	3,253.28
Total Training Fees	5,302.68
Website	191.25
Total Administrative Expenses	46,257.08

2:34 PM

01/30/26

Cash Basis

Jackson County SART
Profit & Loss
 January through December 2025

	Jan - Dec 25
Insurance	
Health Insurance	37,202.08
Total Insurance	37,202.08
Mileage	2,286.20
Payroll Expenses	
Gross Wages	
Associate Director	385.00
Community Coordinator	929.50
Continuing Education	2,716.80
Dev/Ed Director	78,567.90
Exam Fees	2,410.00
Executive Director	89,437.79
Preceptor	1,300.00
Prevention Coordinator	
OregonSaves	0.00
Prevention Coordinator - Other	45,283.14
Total Prevention Coordinator	45,283.14
Prevention Educator	71,276.50
RS	70,957.51
SANE On Call	48,106.77
SANE Program Manager	81,315.00
Training - Continuing Education	1,248.78
Training - SANE training	156.00
Trial Fee	1,156.00
Gross Wages - Other	1,234.35
Total Gross Wages	496,481.04
Health insurance	18,381.00
Payroll Tax Expense	
OR Statewide Transit Tax	0.00
Oregon Paid Leave	506.97
Payroll Tax Expense - Other	45,275.64
Total Payroll Tax Expense	45,782.61
State Unemployment	5,096.02
Workers Benefit Fund	199.20
Payroll Expenses - Other	75,900.45
Total Payroll Expenses	641,840.32
Program Expenses	
Client Assistance	
Emergency Housing	1,637.48
Housing	7,290.27
Client Assistance - Other	11,191.79
Total Client Assistance	20,119.54
FNE Expenses	
FNE Insurance Expense	
Malpractice Insurance	522.00
Total FNE Insurance Expense	522.00
SANE certification fee	769.00
SANE Equipment	2,216.00
SANE Supplies	3,941.54
SANE Training - meals	58.39
SANE training - registration	317.90

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01/30/26

Cash Basis

Jackson County SART
Profit & Loss
 January through December 2025

	Jan - Dec 25
Telephone	
Answering Service	1,519.40
Total Telephone	1,519.40
FNE Expenses - Other	701.10
Total FNE Expenses	10,045.33
Prevention Expenses	
Prevention	
School program	-47,442.79
Total Prevention	-47,442.79
Prevention Office Rent	9,000.00
Translation/Interpreta Services	300.00
Total Prevention Expenses	-38,142.79
Resource Specialist Expenses	
Osnium	1,637.94
RS Internet	549.99
RS Office Rent	6,600.00
Total Resource Specialist Expen...	8,787.93
Program Expenses - Other	40.00
Total Program Expenses	850.01
Telephone (old)	
Office Phone	150.46
Telephone (old) - Other	3,231.32
Total Telephone (old)	3,381.78
Travel	3,546.76
Total Expense	735,364.23
Net Ordinary Income	4,796.69
Other Income/Expense	
Other Income	
Rebate/coupon	234.00
Total Other Income	234.00
Net Other Income	234.00
Net Income	5,030.69

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01/30/26

Cash Basis

Jackson County SART
Balance Sheet
 As of December 31, 2025

	Dec 31, 25
ASSETS	
Current Assets	
Checking/Savings	
JC SART Checking	216,296.92
Money Market (8392)	205,009.33
PayPal	1,066.74
Total Checking/Savings	422,372.99
Other Current Assets	
Undeposited Funds	4,941.00
Total Other Current Assets	4,941.00
Total Current Assets	427,313.99
Fixed Assets	
Equipment	11,402.75
Total Fixed Assets	11,402.75
Other Assets	
Accum. Depreciation	-10,045.00
Total Other Assets	-10,045.00
TOTAL ASSETS	428,671.74
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Payroll Liabilities	
Federal Withholding	13.98
Garnishment	1,810.98
Oregon Withholding	-1,416.00
State Unemployment	26,206.87
Workers Benefit Fund	1,473.19
Payroll Liabilities - Other	16,797.89
Total Payroll Liabilities	44,886.91
Payroll Taxes Payable	5,239.35
Unclaimed Property Paya...	1,013.66
Total Other Current Liabilit...	51,139.92
Total Current Liabilities	51,139.92
Total Liabilities	51,139.92
Equity	
Prior Year Equity Adjustme...	4,183.13
Unrestrict (retained earnings)	368,318.00
Net Income	5,030.69
Total Equity	377,531.82
TOTAL LIABILITIES & EQUITY	428,671.74

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Rogue Valley Council of Governments **DATE:** 01/22/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) RVCOG

ADDRESS 155 N 1st Street (Mailing: PO Box 3275) Central Point OR 97502
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Food & Friends Meals on Wheels

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Assistance to obtain and/or maintain housing.

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ \$ 12,000
GRANT CONTACT (If other than Executive Director listed below)

Name Jon Pfefferle
Telephone (541) 734-9505 **E-mail** jpfefferle@rvcog.org

EXECUTIVE DIRECTOR INFORMATION

Name Ann Marie Alfrey
Telephone (541) 423-1334 **E-mail** amalfrey@rvcog.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.


Signature of Board President
Jody Hathaway
Type Name

Ann Marie Alfrey Digitally signed by Ann Marie Alfrey
Date: 2026.01.20 10:09:07 -08'00'
Signature of Executive Director/CEO
Ann Marie Alfrey
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

1. Program/project is: new ☐ established/continuing ☒
pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.)*
Our program provides nutritious meals to homebound older adults 60+ living within the City of Ashland who might otherwise go hungry without the provision of our nutrition services. Our service population is considered high risk and vulnerable to malnutrition, loneliness, isolation and depression.
3. What will this funding enable?
City of Ashland grant funds will help support the Meals on Wheels (MOW) component of our program. Food & Friends reduces feelings of food insecurity by enabling older adults to receive home delivered meals on a donation basis. By providing meals to older adults living on low, fixed incomes, we can help them avoid having to choose between paying for rent and utilities over food.
4. Number of volunteers this program/project will engage: 405
Number of paid program employees this program/project will engage: 12.5 FTE
5. Total number volunteer's agency utilizes: 423
Total number of paid agency employees: 42.7 FTE
6. Outline key strategies of the project/program with timeline and staff structure.
Food & friends provides nutritious meals to eligible participants in Ashland, Mon-Fri, with frozen weekend meals available, if needed. We expect to serve approximately 12,000 home delivered meals in Ashland during FY 25-26. Meal services are accompanied with social connection, referrals to additional services, nutrition education, and an invaluable safety check, allowing older adults to remain independent in their own homes. Our homebound participants report improved nutritional health, increased safety, and decreased isolation. In-home assessments are completed with every new participant with reassessments done annually, allowing outreach staff to determine client needs and make appropriate referrals. Food & Friends program staff providing support for this project: Program Director, Home Delivery Coordinator, Office Specialist, Meal Site Coordinator, and program volunteers.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.
Our MOW program has 4 delivery routes in Ashland that serve eligible homebound older adults who are unable to prepare meals due to illness, injury or disability and are at increased risk of malnutrition, isolation, loneliness and depression. In addition to hand delivering every meal, our volunteers are a vital safety net between participants and other services. Volunteers report health/safety concerns to our office so assistance calls to family members or emergency services can be made, as appropriate. We also provide social dining opportunities at our 6 dining locations throughout Jackson County, including one site in Ashland. Local support is critical as it helps us leverage other funding and meet Federal match requirements.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a. Mission Statement: Together, we strive to cultivate an equitable approach to improving the health, wellbeing and independence of older adults and adults with disabilities through nutrition services, meaningful social connections, and opportunities for education.

Food & Friends is key in efforts towards keeping older adults living safely and with dignity in their own homes. Often the meals, social contact, and vital safety check are all that stands between an older adult and the need for costly institutional care.

1b. RVCOG is the federally designated Area Agency on Aging (AAA) and administrator of long-term care services for older adults and adults with disabilities in Jackson and Josephine Counties. Since 2001, Food & Friends remains the only MOW program delivering meals with an accompanying safety check directly to homebound older adults in the region.

1c. RVCOG's AAA has adopted programs and integrated trauma-informed supports in our departments, both in direct services and structure. The AAA developed and set in motion a Service Equity Plan to address needs for advancement in service delivery and create policies and strategies to improve outcomes with program participants and staff. SAGECare training was introduced to staff in 2023 to improve cultural competency to better serve LGBTQ+ older adults in our communities. SAGECare training continues on a bi-annual basis to keep staff up to date on current information.

2a. Issues: Food insecurity, malnutrition, isolation, loneliness, and depression in older adults dramatically impacts their physical and mental health. Safety issues in the home can add to the stress our participants experience. With our services, many are able to avoid/minimize costly hospitalization or institutional care, reducing federal tax dollars spent on care. Ensuring the provision of meals, socialization, and safety is often all it takes to afford older adults the ability to remain healthy and independent in their own homes.

2b. We promote the ability for older adults and adults with disabilities to live independently in their community by providing nutritionally balanced meals, social interactions to lessen the effects of isolation and loneliness, essential safety net checks and connections to additional services. Meal sites are available to those older adults who are able to attend, providing lunch in a socially interactive environment. Food & Friends operates the dining room in the Ashland Senior Center, and it is a hub for our MOW operation in Ashland.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

Continue from previous page (if needed):

2c. Good nutrition is basic to health and wellbeing. However, our program's daily interaction with hundreds of older adults illustrates that many are unable to provide this fundamental necessity alone. In FY24-25 we served 276,071 meals to both congregate and home delivery participants throughout Jackson and Josephine Counties. During the same period, we served 18,873 meals to our Ashland participants. Results from our 2025 annual survey of MOW participants indicates the following: 91% reported feeling less isolated due to the volunteers' visits; 93% felt safer knowing a volunteer would deliver to their home; 89% reported improved nutritional health; 85% reported that participating in the program improved their quality of life; 87% reported that participating in the program allowed them to remain independent; and 56% reported that our volunteers are often the only people they see in a given day.

2d. The number of meals/individuals served comes from database reports. We conduct annual surveys on participant satisfaction, improved nutritional health, decreases in isolation, and increases in overall safety. We provided pertinent health, safety and nutrition education articles, referrals to additional services and maintain a list of resources on our website in both English and Spanish.

3. In addition to supporting the ability for older adults to remain independent in their own homes, our program is more cost effective for the community when older adults can avoid institutional settings. In Oregon, the average cost of one day in the hospital is \$4,003 and a day in a nursing home is \$520. The average cost of a single Food & Friends home delivered meal was \$11.01 during FY 24-25. Too many of our aging neighbors suffer from poor nutrition, mobility loss and feelings of isolation. The effects of loneliness caused by isolation harm both individual health and the health of our communities. Our services increase positive physical and mental health outcomes in the older adults we serve while providing hundreds of volunteer opportunities for individuals (55 volunteers in Ashland donated 3,583 hours during FY24-25), both of which contribute to the overall wellbeing of our communities. We have strong partnerships and collaborations with the Ashland Senior Center, ACCESS, Senior Services Office, Aging & People with Disabilities and Disability Services Office case management services, Adult Protective Services, hospitals, clinics, service organizations, retailers, and churches. Together with your support, we can create positive impacts that benefit the health and wellbeing of older adults and adults with disabilities while building connected communities.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

1. For most recently completed 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2024 - 06/2025

b. Administration & Fundraising expense: \$ 434,690 14.0%

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990, Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 2,670,241

d. Total expenses: \$ 3,104,931

e. Sources of revenue:

Memberships/ individual contributions	\$ <u>196,827</u>	<u>6.3</u> %
Raised through fundraising activities	\$ <u>2,200</u>	<u>0.1</u> %
Government	\$ <u>1,876,339</u>	<u>60.4</u> %
Foundations	\$ <u>6,806</u>	<u>0.2</u> %
United Way	\$ <u>11,967</u>	<u>0.4</u> %
Fees for Service	\$ <u>1,007,263</u>	<u>32.4</u> %
Other (reimbursements, payments, bequests, etc.)	\$ <u>2,664</u>	<u>0.1</u> %

f. Total revenue: \$ 3,104,066

2. What is the highest level of financial reporting required by your funders?
Federally mandated Single Audit as required by Title 2 US Code of Federal Regulations Part 200.
3. Briefly describe your sustainability outlook for the project/program in the future.
We raise funds a year in advance to prevent crises from putting immediate hardship on our participants. The majority of our budgeted funding is Federal. Years of successful direct-mail fundraising has resulted in many dedicated donors and our ability to maintain an emergency fund. We rely on the emergency fund to help close the funding gap in lean years. Our program saves millions of dollars each year by utilizing a large volunteer base to deliver meals to our participants.
4. a. Total organizational annual budget current ongoing fiscal year: 10,883,751
- b. Total program/project budget current ongoing fiscal year: 3,279,792

ORGANIZATION BUDGET 2025-26

PROJECT PERIOD July 1, 2025, to June 30, 2026

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$ 10,000	\$ 60,623
City of Ashland Funds	\$ 12,000	\$ 15,810
Jackson County Funds	\$ 0	\$ 48,064
CDBG (identify)	\$ 0	\$ 0
Other State or Federal Funds	\$ 0	\$ 5,348,159
United Way Funds	\$ 0	\$ 10,000
Other Funds (identify) Charges for Services, Donations, Internal Revenues	\$ 0	\$ 5,379,096
SUB TOTALS	\$ 22,000	\$ 10,861,752
TOTAL REVENUE (Pending & Secured)		\$ 10,883,752
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 2,823,558
Total Benefits		\$ 2,193,966
TOTAL PERSONNEL SERVICES		\$ 5,017,524
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Materials & Supplies		\$ 402,887
Purchased Services		\$ 3,175,465
Indirect Charges		\$ 473,488
Internal Services		\$ 1,118,566
Operating Contingency (MPO's)		\$ 513,076
Depreciation & Other Expenses		\$ 142,746
TOTAL MATERIALS & SERVICES		\$ 5,826,228
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify: Vehicle Replacement		\$ 40,000
TOTAL CAPITAL OUTLAY		\$ 40,000
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 10,883,752

PROGRAM BUDGET 2025-26

PROJECT PERIOD July 1, 2025 to June 30, 2026

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$ 10,000	\$ 0
City of Ashland Funds	\$ 12,000	\$ 0
Jackson County Funds	\$ 0	\$ 30,000
CDBG (identify)	\$ 0	\$ 0
Other State or Federal Funds	\$ 0	\$ 1,304,757
United Way Funds	\$ 0	\$ 10,000
Other Funds (identify) Charges for Services, Donations	\$ 0	\$ 1,913,034
SUB TOTALS	\$ 22,000	\$ 3,257,791
TOTAL REVENUE (Pending & Secured)		\$3,279,791
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 530,211
Total Benefits		\$ 437,679
TOTAL PERSONNEL SERVICES		\$ 967,890
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Indirect & Interfund		\$ 369,484
Materials & Services		\$ 6,802
Meals		\$ 1,508,250
Kitchen Lease, Site Rents, Utilities		\$ 116,627
Mileage & Vehicles		\$ 90,800
Miscellaneous Expenses		\$ 179,938
TOTAL MATERIALS & SERVICES		\$ 2,271,901
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify: Vehicle replacement		\$ 40,000
TOTAL CAPITAL OUTLAY		\$ 40,000
TOTAL EXPENDITURES (Sum of A, B & C)		\$3,279,791

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

I.		# Whole Program	# Ashland
Gender	Female	1189	69
	Male	898	53
Age*	Other	369	6
	Totals	2,456	193
II.			
	0 to 5	0	0
	6 to 12	0	0
	13 to 17	0	0
	18 to 30	2	0
	31 to 40	10	0
	41 to 50	31	0
	51 to 61	94	4
	62 +	2014	189
	Unknown	305	0
	Total	2,456	193

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland
White	1,498		96
Black/African American	14		2
American Indian/Alaskan Native	53		4
Native Hawaiian/other Pacific Islander	15		2
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other	876	46	89
Totals	2,456	46	193

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Rogue Valley Council of Governments (RVCOG)

PROGRAM/PROJECT TITLE Food & Friends Meals on Wheels

1. Number of board members required in bylaws? Minimum 24 Maximum 24
2. Number of board members currently active? # Voting 23 Vacancies 1
3. Average percentage board meeting attendance (over last completed year): 55 %
4. Percent of board in attendance required for a quorum: 51 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
RVCOG Board of Directors	<u>24</u>
Executive Committee of RVCOG Board	<u>6</u>
Senior Advisory Council	<u>9</u>

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

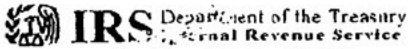
	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	<u>Unknown</u>	<u>Unknown</u>
Black/African American	<u>Unknown</u>	<u>Unknown</u>
American Indian/Alaskan Native	<u>Unknown</u>	<u>Unknown</u>
Native Hawaiian/other Pacific Islander	<u>Unknown</u>	<u>Unknown</u>
American Indian/Alaskan Native and White	<u>Unknown</u>	<u>Unknown</u>
Black/African American and White	<u>Unknown</u>	<u>Unknown</u>
American Indian/Alaskan Native and Black/African American	<u>Unknown</u>	<u>Unknown</u>
Other Multi Racial	<u>Unknown</u>	<u>Unknown</u>
Other	<u>Unknown</u>	<u>Unknown</u>
Totals	<u>Unknown</u>	<u>Unknown</u>

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

RVCOG does not collect data on the character statistics of the board members. The board members are assigned by the 24 member agencies, all of which are public entities with elected or appointed board members.

2026 RVCOG Board of Directors

Jurisdiction	Primary Rep	Year Appointed	Email Contact
Ashland	Eric Hansen	2025	eric@council.ashland.or.us
Butte Falls	Mike Smeltz	2025	smeltzmichael@yahoo.com
Cave Junction	Jesse Dugas	2025	jesse.dugas@cavejunctionoregon.us
Central Point	Kelley Johnson	2021	kelley.johnson@centralpointoregon.gov
Eagle Point	Kathy Sell	2023	kathysell@cityofeaglepoint.org
ECSO	Jody Hathaway	2013	Jody.Hathaway@ecso911.com
Gold Hill	Ronald Palmer	2024	ronald.palmer@cityofgoldhill.com
Grants Pass	Victoria Marshall	2025	vmarshall@grantspassoregon.gov
Jackson County	Rick Dyer	2026	dverrr@jacksoncounty.org
Jacksonville	Andrea Thompson	2023	councilorthompson@jacksonvilleor.us
JCFD 3	Mike Hussey	2023	mikeh@jcf3.com
JCLD	Marta Tarantsey	2024	mtarantsey@jcls.org
Josephine County	Vacant		
JSWCD	Trevor Morris	2025	trevor.morris@jswcd.org
Medford	Zac Smith	2025	council@medfordoregon.gov
Phoenix	Al Muelhoefer	2025	al.muelhoefer@phoenixoregon.gov
RCC	Jonathan Bilden	2025	JBilden@roguecc.edu
Rogue River	Pam VanArsdale	2023	mayor@cityofrogueriver.org
RVSS	John Quinn	2023	jquinn@siskiyouda.org
RVTD	Bill Mansfield	2008	541-779-2521
Shady Cove	Lena Richardson	2025	billena70@gmail.com
SORED	Blair Sundell	2025	blair@soredi.org
SOU	Marc Overbeck	2024	overbeckm@sou.edu
Talent	Darby Ayers-Flood	2017	mayor@cityoftalent.org



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248230137
June 07, 2011 LTR 4076C E0

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BODC: TE

ROGUE VALLEY COUNCIL OF GOVERNMENTS
PO BOX 3275
CENTRAL POINT OR 97502-0011



58622

Federal Identification Number: [REDACTED]
Person to Contact: Ms. Edwards
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This responds to your request for information about your federal tax status. Our records do not specify your federal tax status. However, the following general information about the tax treatment of state and local governments and affiliated organizations may be of interest to you.

GOVERNMENTAL UNITS

Governmental units, such as States and their political subdivisions, are not generally subject to federal income tax. Political subdivisions of a State are entities with one or more of the sovereign powers of the State such as the power to tax. Typically they include counties or municipalities and their agencies or departments. Charitable contributions to governmental units are tax-deductible under section 170(c)(1) of the Internal Revenue Code if made for a public purpose.

ENTITIES MEETING THE REQUIREMENTS OF SECTION 115(1)

An entity that is not a governmental unit but that performs an essential government function may not be subject to federal income tax, pursuant to Code section 115(1). The income of such entities is excluded from the definition of gross income as long as the income (1) is derived from a public utility or the exercise of an essential government function, and (2) accrues to a State, a political subdivision of a State, or the District of Columbia. Contributions made to entities whose income is excluded income under section 115 may not be tax deductible to contributors.

TAX-EXEMPT CHARITABLE ORGANIZATIONS

An organization affiliated with a State, county, or municipal government may qualify for exemption from federal income tax under section 501(c)(3) of the Code, if (1) it is not an integral part of the government, and (2) it does not have governmental powers inconsistent with exemption (such as the power to tax or to exercise enforcement or regulatory powers). Note that entities may meet the requirements of both sections 501(c)(3) and 115 under certain circumstances. See Revenue Procedure 2003-12, 2003-1 C.B. 316.

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ROGUE VALLEY COUNCIL OF GOVERNMENTS
PO BOX 3275
CENTRAL POINT OR 97502-0011

Most entities must file a Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code, to request a determination that the organization is exempt from federal income tax under 501(c)(3) of the Code and that charitable contributions are tax deductible to contributors under section 170(c)(2). In addition, private foundations and other persons sometimes want assurance that their grants or contributions are made to a governmental unit or a public charity. Generally, grantors and contributors may rely on the status of governmental units based on State or local law. Form 1023 and Publication 4220, Applying for 501(c)(3) Tax-Exempt Status, are available online at www.irs.gov/eo.

We hope this general information will be of assistance to you. This letter, however, does not determine that you have any particular tax status. If you are unsure of your status as a governmental unit or state institution whose income is excluded under section 115(1) you may seek a private letter ruling by following the procedures specified in Revenue Procedure 2007-1, 2007-1 I.R.B. 1 (updated annually).

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



S. A. Martin, Operations Manager
Accounts Management Operations



Certified Public Accountants
And Business Advisors

February 27, 2018

To Rogue Valley Council of Government Donors:

Rogue Valley Council of Governments (RVCOG) is established pursuant to Oregon Revised Statutes 190.003 through 190.110. Oregon Revised Statutes (ORS) 190.010 provides that units of local government may enter into an intergovernmental agreement with other units of local government for the performance of any function or activity authorized to be performed by the parties of the agreement. Also ORS 190.007 states that for furthering economy and efficiency in local government, intergovernmental cooperation is declared a matter of statewide concern.

In our opinion, RVCOG is an instrumentality of political subdivisions of the State of Oregon. Therefore, contributions to RVCOG, made for exclusively public purposes, are deductible under section 170(c)(1) as charitable contributions "for the use of" political subdivisions.

You should consult with appropriate tax counsel regarding any limitations which may apply.

Sincerely,

A handwritten signature in blue ink that reads 'Carolyn M. Ryder, CPA, CGMA'.

Carolyn M. Ryder, CPA, CGMA
Isler Medford, LLC

CMR



Certified Public Accountants
And Business Advisors

Independent Auditors' Report Required by Oregon State Regulations

We have audited the basic financial statements of Rogue Valley Council of Governments as of and for the year ended June 30, 2025, and have issued our report thereon dated December 19, 2025. We conducted our audit in accordance with auditing standards generally accepted in the United States of America.

Compliance

As part of obtaining reasonable assurance about whether Rogue Valley Council of Governments' financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion.

We performed procedures to the extent we considered necessary to address the required comments and disclosures which included, but were not limited to the following:

- Deposits of public funds with financial institutions (ORS Chapter 295).
- Indebtedness limitations, restrictions, and repayment.
- Budgets legally required (ORS Chapter 294).
- Insurance and fidelity bonds in force or required by law.
- Programs funded from outside sources.
- Authorized investment of surplus funds (ORS Chapter 294).
- Public contracts and purchasing (ORS Chapters 279A, 279B, 279C).

In connection with our testing nothing came to our attention that caused us to believe Rogue Valley Council of Governments was not in substantial compliance with certain provisions of laws, regulations, contracts, and grants, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules 162-10-000 through 162-10-320 of the Minimum Standards for Audits of Oregon Municipal Corporations.

OAR 162-10-0230 Internal Control

In planning and performing our audit, we considered Rogue Valley Council of Governments' internal control over financial reporting as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Council's internal control over financial reporting. Accordingly, we do not express an opinion on the effectiveness of the Council's internal control over financial reporting.

This report is intended solely for the information and use of council members, management, and the Oregon Secretary of State and is not intended to be and should not be used by anyone other than these parties.

Isler Medford, LLC

Isler Medford, LLC
December 19, 2025

**ROGUE VALLEY COUNCIL OF GOVERNMENTS
AUDIT COMMENTS AND DISCLOSURES**

June 30, 2025

I. Internal Control

See Independent Auditors' Report on internal control structure related matters noted in a financial statement audit conducted in accordance with *Government Auditing Standards*.

II. Accounting Records

We found the accounting records of Rogue Valley Council of Governments to be adequate for audit.

III. Collateral

Based on the results of our tests, balances on deposit with financial institutions were secured in accordance with the requirements of ORS 295.

IV. Indebtedness

Rogue Valley Council of Governments complied with legal or contractual provisions relating to short-term and long-term debt.

V. Budget Compliance

We reviewed the preparation, adoption, and execution of the budget for the year ended June 30, 2025 and the preparation and adoption of the budget for the year ending June 30, 2026. Rogue Valley Council of Governments has complied with statutory requirement for the current and ensuing year's budget.

Resolutions authorizing appropriations for each fund sets the level by which expenditures cannot legally exceed appropriations. The legal level of budgetary control is the fund level for all funds except the Special Revenue Fund, which is budgeted at the department level. Budgeted amounts are as originally adopted or as amended by the Board of Directors. Expenditures did not exceed appropriations for the year ended June 30, 2025.

VI. Insurance and Fidelity Bond Coverage

We examined Rogue Valley Council of Governments' insurance policies and determined that such policies appeared to be in force at June 30, 2025. We are not competent by training to comment on the adequacy of the insurance policies covering Rogue Valley Council of Governments' property at June 30, 2025.

**ROGUE VALLEY COUNCIL OF GOVERNMENTS
AUDIT COMMENTS AND DISCLOSURES**

June 30, 2025

VIII. Programs Funded from Outside Sources

See Independent Auditors' Report on compliance based on an audit of basic financial statements performed in accordance with *Government Auditing Standards*.

IX. Investments

Based on our review of Rogue Valley Council of Governments' records, it appears Rogue Valley Council of Governments was in compliance with the legal requirements of ORS Chapter 294 pertaining to the investment of public funds as of June 30, 2025, and for the year then ended.

X. Public Contracts and Purchasing

Rogue Valley Council of Governments' procedures for awarding public contracts were reviewed and appear to comply with the legal requirements contained in ORS Chapter 279.



City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Rogue Valley Mentoring **DATE:** 02/06/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) N/A

ADDRESS 2931 S. Pacific Hwy Medford OR 97501
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Ashland High School Referral-Based Mentoring Circles

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Services for at-risk youth

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ 10000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Laura Pinney

Telephone (541) 708-6688 **E-mail** laura@rvmentoring.org

CERTIFICATION

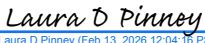
The information contained in this application is true and correct to the best of my knowledge.


Anne Williams (Feb 13, 2026 12:58:27 PST)

Signature of Board President

Anne Williams

Type Name


Laura D Pinney (Feb 13, 2026 12:04:16 PST)

Signature of Executive Director/CEO

Laura Pinney

Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

1. **Program/project is:** new ☐ established/continuing ☐
 pilot ☐ If pilot, expected duration 12 months
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.)*

This program serves 23 ninth-grade students at Ashland High School. Students are referred by school counselors based on risk factors including frequent behavioral referrals, chronic absenteeism, or social-emotional challenges that impact academic success. Demographics reflect AHS student body: 21% experience poverty, 13% identify as Latino/a/x, and only 63% attend school regularly.
3. What will this funding enable?

This \$10,000 investment supports two weekly, school-day mentoring circles serving 23 at-risk ninth graders in 2026–27. Funds cover staff facilitation, clinical supervision, coordination, and essential supplies, removing cost, transportation, and stigma barriers to care and enabling referrals to RVM's 1:1 Match Program for students needing ongoing support.
4. Number of volunteers this program/project will engage: 4
Number of paid program employees this program/project will engage: 4
5. Total number volunteer's agency utilizes: 62
Total number of paid agency employees: 12
6. Outline key strategies of the project/program with timeline and staff structure.

From July–August 2026, RVM will prepare for implementation through staff training, school and clinical coordination, family outreach, and baseline CASEL surveys. Two weekly school-day mentoring circles will launch in September 2026, followed by weekly 50-minute circles through June 2027 with ongoing school coordination, individual support, clinical referrals, and monthly clinical supervision. Mid-year progress review will occur in January 2027, with post-program surveys, outcomes analysis, and final reporting in June 2027. The program is staffed by a Program Director, licensed clinical supervisor, trained Lead Mentors, and trained volunteer mentors.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

Five students have already been referred from AHS circles to RVM's 1:1 Match Program during the 2025-26 school year, demonstrating immediate need for wraparound services. This funding supports both prevention (universal circle access) and intervention (individualized mentoring for highest-need students), creating a true continuum of care within Ashland schools.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1. a) Rogue Valley Mentoring (RVM) transforms communities by investing in young people through meaningful mentoring relationships. Since 2005, RVM has trained more than 600 volunteer mentors and served over 2,900 youth ages 9–24 across Jackson County. All services are provided at no cost and prioritize youth facing the greatest barriers to support, including BIPOC youth (predominantly Latino), youth in rural and under-resourced communities, and those impacted by poverty and trauma.

This program directly advances RVM's mission by providing consistent adult support to Ashland's most vulnerable ninth graders during a critical developmental transition. Using a referral-based, school-day model, the program serves all students in Study Skills classes. These students experience behavioral, academic, or social-emotional challenges and need more support than overstretched school counselors can provide. Through small-group mentoring circles and wraparound 1:1 matches for students requiring intensive support, RVM creates accessible pathways to the stable, caring relationships shown to protect against disengagement, mental health crises, and school failure.

b) RVM brings deep expertise in school-based youth mentoring with proven outcomes. Key strengths include:

- Culturally responsive staffing: 75% of staff identify as BIPOC and 63% are bilingual Spanish/English.

Many grew up in Jackson County and attended the same schools as current participants.

- Trauma-informed clinical capacity: All staff are certified in ASIST Suicide Prevention, Youth Mental Health First Aid, and Youth Crisis Intervention. A licensed clinical social worker (LCSW) provides weekly supervision, reviews mentor reports, and coordinates care with school counselors.

- Three-tiered BEST model: Recognized by the Oregon Department of Education as an emerging best practice, our Behavioral Education Support Tiers framework provides a seamless continuum from prevention (Tier 1 circles), to targeted support (Tier 2 check-ins), to clinical referral (Tier 3). This model reduces counselor caseloads while ensuring no student falls through gaps.

- Proven school partnerships: RVM serves 300+ students weekly across three districts. At Talent Middle School, 100% of participating teachers request continued programming, citing stronger outcomes than standardized SEL curricula due to our relationship-driven, trauma-informed approach.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

Continue from previous page (if needed):

c) RVM embeds trauma-informed principles across all programming, recognizing that many youth we serve have experienced adverse childhood experiences such as poverty, housing instability, family separation, or community violence. Core practices include predictable structure, safe spaces, consistent mentors, youth voice in activities, small-group peer support, strengths-based facilitation, and culturally responsive, bilingual programming. All staff complete comprehensive training on ACEs, trauma responses, de-escalation, mandatory reporting, cultural humility, and neurodiversity-affirming practices. Ongoing learning occurs through monthly staff meetings and weekly clinical supervision with our LCSW.

2 a) This program responds to three interconnected challenges facing Ashland youth:

- Youth mental health crisis: Over half of Ashland High School juniors rate their mental health as fair or poor, with widespread anxiety, depression, and school avoidance.
- Limited access to behavioral health services: Counselor-to-student ratios exceed recommended levels, and community providers face long waitlists, compounded by cost, transportation, and stigma barriers.
- Academic disengagement: Only 63% of students attend school regularly. Chronic absenteeism strongly predicts course failure, dropout, and reduced postsecondary opportunities.

b) RVM's approach is grounded in developmental relationships research and social-emotional learning theory, which show that one consistent, caring adult can significantly alter outcomes for at-risk youth. Our school-embedded, referral-based model uses the CASEL framework to build self-awareness, self-management, social awareness, relationship skills, and responsible decision-making. The program operates across three tiers, providing universal skill-building, targeted individual support, and clear pathways to clinical care when needed. This continuum normalizes help-seeking, removes access barriers, and reduces reliance on emergency services while strengthening protective factors.

c) Evidence supporting this model includes national research showing mentoring increases high school completion and improves academic and behavioral outcomes. RVM's own data reinforce these findings. At Talent Middle School, mentoring days showed higher attendance, significant reductions in classroom disruptions, measurable academic gains, and increased youth confidence and help-seeking behaviors. Schools report the first reduction in expressed suicidal ideation since 2020. During the 2024–25 Ashland High School pilot, the program successfully identified students needing higher-intensity support, referring them into RVM's 1:1 Match Program and community behavioral health services.

d) RVM uses a multi-method evaluation framework including CASEL-aligned pre/post youth surveys, structured mentor observation reports reviewed weekly, school attendance and behavioral data (with consent), youth satisfaction surveys, and standardized mental health screenings for Tier 2 students. All data are disaggregated to ensure equitable impact and guide continuous improvement.

3. Early, accessible behavioral health support benefits the entire Ashland community by preventing crisis, strengthening families, and improving school climate. Teachers report improved classroom environments, counselors gain capacity to focus on crises and postsecondary planning, and families experience reduced stress and conflict. Long-term benefits include improved graduation rates, reduced justice system involvement, and a stronger future workforce.

RVM operates as a critical bridge in Ashland's youth behavioral health continuum, working closely with Ashland School District, La Clinica, Kairos, Oregon DHS, and our own 1:1 Match Program. This integrated model expands school capacity without duplicating services, reduces strain on emergency and clinical systems, and ensures youth receive the right level of support at the right time.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2023-06/2024

b. Administration & Fundraising expense: \$ 219,504 25.48 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 396,607

d. **Total expenses:** \$ 861,472

e. Sources of **revenue:**

Memberships/ individual contributions \$ 45,872 6 %

Raised through fundraising activities \$ _____ %

Government \$ 211,183 29.18 %

Foundations \$ 313,609 43.34 %

United Way \$ 130 _____ %

Fees for Service \$ 49,948 6.9 %

Other (reimbursements, payments, bequests, etc.) \$ 103,015 14 %

f. **Total revenue:** \$ 723,576

2. What is the highest level of financial reporting required by your funders?

RVM provides quarterly financial reports to funders and maintains grant-specific fund accounting

3. Briefly describe your sustainability outlook for the project/program in the future.

RVM's sustainability approach emphasises diversified funding and gradual expansion of long-term revenue. The program is supported through foundation grants, individual giving, with additional public funding pathways under exploration through Jackson County Mental Health. (AHS does not contribute financially to our services.)

4. a. Total organizational annual budget **current ongoing** fiscal year: \$687,727

b. Total program/project budget current ongoing fiscal year: \$45,856

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Rogue Valley Mentoring

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$ 12,500	\$
City of Ashland Funds	\$	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds OHA	\$40,000	\$
United Way Funds	\$	\$
Other Funds (identify) Foundations/corporate	\$ 687,727	\$
SUB TOTALS	\$ 687,727	\$
TOTAL REVENUE (Pending & Secured)		\$ 687,727
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 451,458
Total Benefits		\$
TOTAL PERSONNEL SERVICES		\$ 451,458
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Program and Event Expense		\$ 29,070
Professional Fees and advertising		\$ 167,528
Occupancy		\$ 14,500
Office Expense		\$ 16,620
Transportation		\$ 4,550
Staff development and training		\$ 4,000
TOTAL MATERIALS & SERVICES		\$ 236,268
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 687,726

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Rogue Valley Mentoring

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify) Ashland Comm Health Fdn	\$ 40,000	\$
SUB TOTALS	\$ 40,000	\$
TOTAL REVENUE (Pending & Secured)	40,000	\$
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 36,546
Total Benefits		\$
TOTAL PERSONNEL SERVICES		\$ 36,546
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Programs & Materials		\$ 980
Professional Fees		\$ 5,725
Occupancy		\$ 1,015
Office		\$ 1,055
Transportation		\$ 180
Staff development & Training		\$ 335
TOTAL MATERIALS & SERVICES		\$ 9,290
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		\$ 45,836

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

I.		# Whole Program	# Ashland
	Gender		
	Age*		
	Female	_____	14
	Male	_____	1
II.	Other	_____	8
	Totals	_____	_____
	0 to 5	_____	_____
	6 to 12	_____	_____
	13 to 17	_____	23
	18 to 30	_____	_____
	31 to 40	_____	_____
	41 to 50	_____	_____
	51 to 61	_____	_____
	62 +	_____	_____
	Unknown	_____	_____
	Total	_____	_____

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland
White	_____	_____	19
Black/African American	_____	_____	_____
American Indian/Alaskan Native	_____	_____	1
Native Hawaiian/other Pacific Islander	_____	_____	_____
American Indian/Alaskan Native and White	_____	_____	_____
Black/African American and White American	_____	_____	_____
Indian/Alaskan Native and Black/African American	_____	_____	_____
Other Multi Racial	_____	_____	_____
Other	_____	_____	3
Totals	_____	_____	23

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Rogue Valley Mentoring

PROGRAM/PROJECT TITLE Ashland High School Referral-Based Mentoring Circles

1. Number of board members required in bylaws? Minimum n/a Maximum 10
2. Number of board members currently active? # Voting 9 Vacancies 0
3. Average percentage board meeting attendance (over last completed year): 90 %
4. Percent of board in attendance required for a quorum: 90 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Executive committee	<u>5</u>
Finance/Budget Committee	<u>3</u>
Outreach Committee	<u>5</u>

6. Characteristics of Board of Directors at time of application:

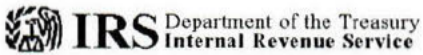
Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	<u>8</u>	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial	<u>1</u>	
Other		
Totals	<u>9</u>	

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

25-26 RVM Board Roster							
Name and Position	Contact Info	Professional Affiliation	Special Skills	Gender & Ethnicity	Board Term Start	Languages	Contribution
Name and Position	Contact Info	Professional Affiliation	Special Skills	Gender & Ethnicity	Board Term Start	Languages	Contribution
Todd Iversen Board Treasurer	5824 Quicksilver Dr., McKinney, TX 75070 214-912-1921 todd@rvmentoring.org	Client Director, Ziosk Media Network	Strategic Planning, Business and Program Management, Marketing and Leadership Development	Male, Caucasian	11/1/2016		yes
Jessica Therkelsen, Esq. Board Secretary	375 Helman St., Ashland OR 97520 805-448-1398 jessica@rvmentoring.org	Nonprofit & International Humanitarian Aid Lawyer	Policies and Procedures, Risk assessments, Budget Review, Program Management	Female, Caucasian	11/12/2021		yes
Kellie England Board Vice Chair	3989 Livingston Rd., Central Point, 97502 916-462-7916 kellie@rvmentoring.org	Banker at Rogue Credit Union	Personnel/HR, Leadership/Vision, Experience with Training or Facilitation	Female, Caucasian	8/25/2022		yes
Bea Bacher-Wetmore	858 Blackberry Lane, Ashland, 97520 541-708-3835 bea@rvmentoring.org	Retired: HS Biology Teacher & Research Labs		Female, Caucasian	9/20/2023	english and spanish	yes
Anne Williams Board Chair	1044 Arrowhead Trail, Eagle Point, 97524 541-613-0772 anne@rvmentoring.org	Corporate Strategist	Finance/Accounting, Contacts with Business Leaders, Business & Entrepreneurial Skills, Leadership/Vision	Female, Caucasian	10/12/2023		yes
Adam Bowers	384 Helman St Ashland OR 97520 (610) 392-6661 axbowers@gmail.com	PRODUCT MANAGEMENT, TECHNOLOGY STRATEGIST DATA AND ANALYTICS EXPERTISE	Adam is a volunteer 1:1 mentor and a recurring monthly donor	Male, Caucasian	01-2025		yes
Martha Kalin	331 Randy St Ashland, OR 97520 303-589-8633 marthakalin@icloud.com	Health Care Planning & Administration/Social Work	Poet, volunteer recruitment, Program Development, Strategic Planning, Previous Board Experience Youth Vision (a youth mentoring organization in Cleveland, OH) 1992-94, Menorah Park (a non-profit nursing home in Beachwood, OH) 1992-1994, Shoshoni Yoga Retreat (non-profit retreat center in Colorado) 2004-2012, ALSO going to be a 1:1 mentor	Female, Caucasian	2/1/2025	English	yes
Luke Bracerro	541-625-9643	N/A	1:1 mentee and mentor as well as part of RVMs YLAB	Male, More than one race	05/15/2025	English	

25-26 RVM Board Roster							
Name and Position	Contact Info	Professional Affiliation	Special Skills	Gender & Ethnicity	Board Term Start	Languages	Contribution
Shae Johns	541.973.4349, Shae.Johns@sogoodwill.org, shae@rvmentoring.org, 100 Mooreland Ter, Eagle Point OR 97524	Goodwill	holding certificates in Non-Profit Financial Management and Non-Profit Management and Leadership from Harvard, and a certificate in Diversity, Equity and Inclusion from Cornell	Female, Caucasian	10/01/2025	English	yes



OGDEN UT 84201-0038

In reply refer to: 0444427733
Aug. 03, 2018 LTR 147C 0
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BODC: TE

ROGUE VALLEY MENTORING
% LESLIE LANES
295 E MAIN ST STE 6
ASHLAND OR 97520-1848



033340

Employer identification number: [REDACTED]

Dear Taxpayer:

Thank you for your phone call on July 25, 2018.

Your employer identification number (EIN) is [REDACTED]. Please keep this letter in your permanent records. Enter your name and EIN on all federal business tax returns and on related correspondence.

You can get any of the forms or publications mentioned in this letter by visiting our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, you can call us at 800-829-0115.

If you prefer, you can write to us at the address at the top of the first page of this letter.

When you write, include a copy of this letter, and provide your telephone number and the hours we can reach you in the spaces below.

Telephone number () _____ Hours _____

Keep a copy of this letter for your records.

Thank you for your cooperation.

Aug. 03, 2018

LTR 147C 0

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00003137

ROGUE VALLEY MENTORING
% LESLIE LANES
295 E MAIN ST STE 6
ASHLAND OR 97520-1848

Sincerely yours,



Ginni L. Redfern
Program Manager, AM OPS 1

Enclosures:
Copy of this letter

Statement of Activity Comparison

Rogue Valley Mentoring

July 1, 2024-June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2024 - JUN 30 2025	JUL 1 2023 - JUN 30 2024 (PY)
Income		
4100 Grants	252,495.79	313,609.00
4200 Government Contracts	138,635.00	211,132.87
4300 Contributions	35,410.60	45,871.91
4310 Donor Advised Funds	11,000.00	
4500 Fiscal Sponsorships		
4510 SOHE Fiscal Sponsor	40,658.30	40,758.96
Total for 4500 Fiscal Sponsorships	\$40,658.30	\$40,758.96
4600 Event Income	752.00	1,288.12
4650 Sponsorships	3,000.00	2,500.00
4700 School District Contributions	5,000.00	46,159.38
4750 Trade/In-Kind Donation Income	55,944.00	58,896.00
4800 Interest Income	2,341.90	1,785.50
4760 Building Use Rent Income		1,575.00
Total for Income	\$545,237.59	\$723,576.74
Cost of Goods Sold		
Gross Profit	\$545,237.59	\$723,576.74
Expenses		
5000 Personnel expense		
5100 Salaries	365,692.55	460,646.79
5200 Payroll taxes	31,661.33	41,989.75
5500 HRA Expense	15,000.00	17,250.00
5600 Workers Compensation	1,545.88	1,938.16
5800 Other health benefits	3,960.00	4,560.00
5900 Payroll reimbursements	-20.00	-817.06
Total for 5000 Personnel expense	\$417,839.76	\$525,567.64
6000 Program expense		
6120 Community outreach	817.46	452.62
6140 Meals & snacks	4,794.23	7,560.16
6150 Program materials/supplies/activities	2,672.27	4,265.25
6160 Field trips	1,118.42	274.00
6180 Training materials & promotion	181.40	802.73
6190 Mentee incentives	61.35	1,795.11
6220 Gifts & Recognition	447.20	286.21
6240 Stipends	18,031.15	11,250.13
6260 Volunteer Training & Support	634.07	4,156.92
6270 Background checks	175.00	362.50
6280 RVM Program & Staff Events	90.84	12,815.57

Statement of Activity Comparison

Rogue Valley Mentoring

July 1, 2024-June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2024 - JUN 30 2025	JUL 1 2023 - JUN 30 2024 (PY)
6290 Celebration - End of Year	86.80	1,016.31
6300 Community Garden Expense		2,407.76
Total for 6000 Program expense	\$29,110.19	\$47,445.27
6500 Events		
6510 Publicity and promotion	298.24	423.00
6520 Printing	453.92	101.07
6525 Postage	23.96	
6530 Supplies & aesthetics	222.32	777.85
6550 Food & catering	608.71	2,000.65
6560 Outside services	150.00	1,309.50
6570 Rental equipment	1,194.96	979.97
6580 Honoraria/Stipend	975.00	915.00
6540 Facility rental		75.00
Total for 6500 Events	\$3,927.11	\$6,582.04
6600 Professional fees		
6610 Audit and Accounting services	16,176.75	38,372.14
6635 HR Fees	2,196.00	3,096.00
6650 Mentor support specialists	27,500.00	30,000.00
6660 In-Kind Professional Services	55,944.00	55,944.00
6665 Advertising & Marketing	13,900.00	5,020.00
6670 Fundraising services	43,650.75	43,097.78
6690 Professional fees - other	450.00	18,791.78
6620 Information Technology services (deleted)		20.00
6640 Legal services		4,095.00
6680 Content development (deleted)		5,225.00
Total for 6600 Professional fees	\$159,817.50	\$203,661.70
6700 Advertsing & Promotion		
6710 Advertising & promotion	1,609.54	1,843.54
6730 Gifts & Awards	323.45	634.22
Total for 6700 Advertsing & Promotion	\$1,932.99	\$2,477.76
6800 Occupancy		
6810 Rent	10,200.00	9,850.00
6830 Telecommunications	2,365.94	2,563.44
6840 Security	600.93	762.83
6860 Equipment (deleted)	65.00	
6870 Repairs and maintenance	517.53	1,723.37
6880 Non-payroll taxes paid	479.00	976.00
Total for 6800 Occupancy	\$14,228.40	\$15,875.64

Statement of Activity Comparison

Rogue Valley Mentoring

July 1, 2024-June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2024 - JUN 30 2025	JUL 1 2023 - JUN 30 2024 (PY)
7000 Office		
7010 Office supplies	1,983.40	4,580.31
7050 Computer supplies	144.98	2,329.81
7100 Postage and Delivery	282.62	920.57
7150 Printing & Copying	434.52	650.75
7250 IT software and licenses	9,276.82	10,175.60
7300 Dues & subscriptions	419.25	599.60
7350 Licenses & Permits	50.00	50.00
7400 Bank/Merchant Fees	78.49	4.97
7500 Insurance	4,787.84	5,253.84
Total for 7000 Office	\$17,457.92	\$24,565.45
8000 Travel	\$0.00	
8010 Local travel/Mileage	4,556.72	5,882.43
8030 Per Diem	0.00	
8110 Lodging	512.80	794.16
8020 Meals		356.62
8120 Airfare		1,708.72
Total for 8000 Travel	\$5,069.52	\$8,741.93
8200 Conferences and meetings		
8210 Meeting expense	156.87	1,165.47
8220 Conferences	800.00	3,280.15
8230 Staff development and training	4,838.00	6,550.82
8250 Board Meetings	275.06	15,058.03
Total for 8200 Conferences and meetings	\$6,069.93	\$26,054.47
REIMBURSEMENTS		
Cell Phone	500.00	500.00
Total for REIMBURSEMENTS	\$500.00	\$500.00
Total for Expenses	\$655,953.32	\$861,471.90
Net Operating Income	-\$110,715.73	-\$137,895.16
Other Income		
HRA Forfeit Revenue	0.40	6,699.03
Total for Other Income	\$0.40	\$6,699.03
Other Expenses		
Net Other Income	\$0.40	\$6,699.03
Net Income	-\$110,715.33	-\$131,196.13

Statement of Financial Position Comparison

Rogue Valley Mentoring

As of June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	AS OF JUNE 30, 2025	AS OF JUNE 30, 2024 (PY)
Assets		
Current Assets		
Bank Accounts		
0000 Cash on hand	0.00	
1020 RVM Checking Debit 8108	123,849.29	123,308.34
1023 RVM Ownership	6,875.78	4,700.08
1024 Shared Deposit Account 8599	9,201.00	9,604.62
1028 HRA Holding Account	\$6.04	\$3.63
1028.1 RVM HRA Holding Funds	19,011.61	15,119.88
1028.2 SOHE HRA Holding Funds	10,138.97	7,694.26
1028.3 HRA Forfeit	0.40	14,295.10
1028.99 HRA Holding Prepaid	0.00	6,750.00
Total for 1028 HRA Holding Account	\$29,157.02	\$43,862.87
RVM Money Maker 2443	92,502.56	92,350.75
Total for Bank Accounts	\$261,585.65	\$273,826.66
Accounts Receivable		
1100 Accounts Receivable	266.00	266.00
1150 Pledges & Grants Receivable	4,883.30	80,854.30
8901 Bank Transfers	5,000.00	5,000.00
Total for Accounts Receivable	\$10,149.30	\$86,120.30
Other Current Assets		
1200 Due to/from SOHealthE	39.36	12,965.35
1210 SOHE Undeposited Funds	-6,250.00	0.00
1220 Undeposited Funds	11,549.00	0.00
1800 Uncategorized Asset	0.00	0.00
2390 Payroll Refunds	0.00	0.00
Employee Draws	0.00	52.95
Total for Other Current Assets	\$5,338.36	\$13,018.30
Total for Current Assets	\$277,073.31	\$372,965.26
Fixed Assets		
Other Assets		
Total for Assets	\$277,073.31	\$372,965.26

Statement of Financial Position Comparison

Rogue Valley Mentoring

As of June 30, 2025

DISTRIBUTION ACCOUNT	TOTAL	
	AS OF JUNE 30, 2025	AS OF JUNE 30, 2024 (PY)
Liabilities and Equity		
Liabilities		
Current Liabilities		
Accounts Payable		
2100 Accounts Payable	6,304.97	15,033.50
Total for Accounts Payable	\$6,304.97	\$15,033.50
Credit Cards	\$769.49	
Other Current Liabilities		
2400 Payroll Liabilities	\$1,307.88	\$13,991.90
2500 HRA Liability	\$29,150.58	\$29,564.14
Total for Other Current Liabilities	\$30,458.46	\$43,556.04
Total for Current Liabilities	\$37,532.92	\$58,589.54
Long-term Liabilities		
Total for Liabilities	\$37,532.92	\$58,589.54
Equity		
3950 Retained Earnings	313,375.72	444,571.85
Net Income	-110,715.33	-131,196.13
3000 Opening Balance Equity	0.00	0.00
3320 Restricted Funds	36,880.00	
3340 Temporarily Restricted Funds	0.00	1,000.00
Total for Equity	\$239,540.39	\$314,375.72
Total for Liabilities and Equity	\$277,073.31	\$372,965.26

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Southern Oregon Jobs with Justice **DATE:** 2/10/2026

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 258 A Street #1-220 Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Ashland Community Peace Meal

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Hunger and Homelessness

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ 7000

GRANT CONTACT (If other than Executive Director listed below)

Name _____

Telephone _____ **E-mail** _____

EXECUTIVE DIRECTOR INFORMATION

Name Jason Houk

Telephone 541-841-8341 **E-mail** jason@sojwj.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Signature of Board President

Vanessa Houk

Type Name

Signature of Executive Director/CEO

Jason Houk

Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

1. **Program/project is:** new ☐ established/continuing ☒
 pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
Our service primarily supports the homeless, housing and food insecure communities in Ashland and surrounding areas.
3. What will this funding enable?
Funding will support our current and moderate expansion of community meal programs and direct outreach services. We will be creating more space for community partners to provide education, harm reduction and service navigation. Furthermore, we wish to implement more tracking of services and clients to better coordinate between service providers and navigators. Funding will also support the facilitation of training for volunteers in trauma and violence informed care, de-escalation and conflict resolution and development of best practices for reaching and serving
4. Number of volunteers this program/project will engage: _____
Number of paid program employees this program/project will engage: 0-2
5. Total number volunteer's agency utilizes: _____
Total number of paid agency employees: 1
6. Outline key strategies of the project/program with timeline and staff structure.
We have a very good working team of volunteers who manage and sustain our weekly meal distributions. We will be paying one dedicated person part-time to help manage our volunteers and to facilitate donations, etc. We have a leadership training program that we encourage volunteers to take to give them the skills to run meetings, fundraising and volunteer recruitment. We have a new distribution day for clothing and gear that we will be organizing in March. We are connecting with a community church this month to bring the Wednesday community meals indoors for the summer.
We have major training and community outreach event planned to April and May. Our goal is to organize all community meals in under a collaboration. We are working with the Ashland Lions to help create the foundation for this hunger management team.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
 - a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1a) Southern Oregon Jobs with Justice (SOJWJ) is a coalition of community, labor, student, and faith-based groups and individuals working to improve our community standard of living and to build transformative power for social, racial, and economic justice in our community. Our direct aid programs all began with requests from our membership to meet the need.

1b) SOJWJ has a solid, long term history of helping to provide needed services in our community. Our organization was founded in 2008 and in 2015 we started the Peace Meal program. Peace Meals actually began in the Ashland Municipal Courtroom after we saw evidence of food insecurity in town that was leading to some folks feeling like they had no other resort than to steal food to feed themselves and their families. We believe that access to basic needs are fundamental human rights, and that nobody should go hungry.

We also have a decade-long history of organizing the annual Peace Meal Community Thanksgiving Feast as well as a holiday giveaway and meal just before Christmas every December. These events draw hundreds of people who live in Ashland. Our beloved holiday celebrations ensure that there's a place at the table for everyone.

1c) Our organization is run by people who have been severely impacted by numerous forms of trauma, and we bring life experience to the forefront of how we interact with our community. The first thing that we do is we build trust with our guests, and we are very protective of their unique needs. Several times each year we offer training on deescalation that is open to the public as well as our volunteers and our unhoused neighbors. Throughout the year, we mirror ways to create safe spaces where our neighbors can feel a sense of security. One thing we've learned is how important it is to be consistent. We are committed to providing meals on Thursdays, Fridays and Sunday mornings as long as there is a need.

We utilize people within the houseless community to help us lead. Over the years we have had staff members who are unhoused. For us it's very important to ensure that our community has a voice within our organization.

We often take online training on trauma informed care, and we share what we've learned with our volunteers. Vanessa Houk, our chair, is certified in Mental Health First Aid training.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Peace Meal

Continue from previous page (if needed):

2a) HUNGER: While it looks like we are feeding our hungry neighbors, a lot more is actually taking place. We distribute emergency weather gear, blankets, sleeping bags, warm clothing, toiletries, snacks, and much more. At the same time, the Peace Meal is a place where people can find some calmness. We take time to build friendships and we care about our friends there. Every week we offer 140+ warm, nutritious, delicious meals. We bring food to the “dusk to dawn” lawn behind the police station, as well as to the OHRA shelter when we have leftovers to share.

LONELINESS: The US is experiencing an epidemic of loneliness and isolation. Peace Meals bring all these people together and there's this din of conversation that fills the room like the best music you've ever heard. We've heard back from guests that the acceptance and love that they've found at Peace Meals has kept them safe from self harm. For all of us it provides something to look forward to each week. Every week we have these family reunions whether we are inside Pioneer Hall, outside in Lithia Park, or downstairs in the public library. We create a sense of home together, wherever we land.

VOLUNTEER OPPORTUNITIES; One of the most powerful pieces of the Peace Meal is found on the “volunteer side” of the table. Often we have folks who are struggling with addiction and part of their recovery program is being of service to others. We have volunteers who have lived through incredibly traumatic life events (losing a spouse to murder, losing a partner to a fatal train accident, living through being a victim of sex trafficking, are just a few examples), and what we've seen is that healing happens on both sides of the table. It's an incredible thing to witness how much personal growth is rooted in the simple value of “we need to take better care of each other”.

2b) Our strategy for change is to empower- the people we serve to be part of the solution. We encourage our guests to step up into volunteer and take leadership positions.

2c) We have numerous examples of how much the Peace Meals are needed in our community and how we are successful at what we do. Here's a few: They came to us hungry, and now they are housed.

A family of 4, (mom, and 3 young children) were living outside on the Greenway. Through extensive networking, and from pulling many different agencies in, this family is currently housed. It was the relationship building that we were able to do with them that helped them finally land in an apartment. The kids still regularly come to the Peace Meal and check in with us often.

Senior support -Many of our guests are seniors and are living on a fixed income. They are able to get a hot meal and take leftovers home for the next day. They tell us how important this is to them.

Hunger lives in the moment. Having meals that are consistent and where someone can get enough food to satiate hunger solves an immediate problem. We've seen how they are then able to begin working on other issues from there.

2 d) We measure outcomes from listening to what our unhoused and low income community wants and needs, and what we can do to better fit those needs. Our programs continue to grow, which is a measure of success. Our volunteer pool continues to draw in new volunteers, which is a measure of success. Our private financial donors continue to invest in our programs, because they see that it's working.

3) Our community partners include the Street Nurses from OHSU Nursing program, SART (Jackson County Sexual Assault Response Team) volunteers, Ashland Lions' Club, Max' s Mission, ACCESS and others. Many of those groups table at the meals so they can be seen by our unhoused friends as allies, and it makes it easier for our community to access needed services. Everything from harm reduction supplies, Trauma support, medical evaluations, access to glasses and hearing aids, can be found at the Peace Meals on a weekly basis.

We have seen how much access to food can help people in crisis. Its Maslo - s Hierarchy – that once we can get basic needs met, we're able to help our neighbors succeed.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY Southern Oregon Jobs with Jusice

PROGRAM/PROJECT TITLE Community Peace Meal

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): Jan 2024 - Dec 2024

b. Administration & Fundraising expense: \$ 5,800 7.7 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 60,932

d. **Total expenses:** \$ 74,915

e. Sources of **revenue:**

Memberships/ individual contributions \$ 7,010 10 %

Raised through fundraising activities \$ 29,061 41 %

Government \$ 2,003 4 %

Foundations \$ 31,810 45 %

United Way \$ _____ %

Fees for Service \$ _____ %

Other (reimbursements, payments, bequests, etc.) \$ _____ %

f. **Total revenue:** \$ 70,524

2. What is the highest level of financial reporting required by your funders?
Annual Report

3. Briefly describe your sustainability outlook for the project/program in the future.
We have a strong support for our operation costs though the contributions of members and member organizations. Programs require us to fundraising and we have a very strong and active volunteer pool who are willing to step up to make things happen. We will continue our campaigns for funding our projects through grants and dedicated donations.

4. a. Total organizational annual budget **current ongoing** fiscal year: 75,000

b. Total program/project budget current ongoing fiscal year: 62,000

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY Southern Oregon Jobs with Justice

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$ 7,000	\$
Jackson County Funds	\$ 10,000	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify) Courage Award and pending grants	\$ 45,000	\$ 30,000
SUB TOTALS	\$ 62,000	\$ 30,000
TOTAL REVENUE (Pending & Secured)		\$ 92,000
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 28,800
Total Benefits		\$
TOTAL PERSONNEL SERVICES		\$ 28,800
B.MATERIALS & SERVICES: (please detail other major budget categories)		
General Expenses		\$ 12,000
Program Expenses:Peace Meal / Direct Aid and Emergency Weather Support		\$ 39,000
Education / Training and Workshops - includes Holiday Parties		\$ 4,000
Organization building and recruitment, leadership training and national travel		\$ 3,000
		\$
		\$
TOTAL MATERIALS & SERVICES		\$ 58,000
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment - Mobile Kitchen operation and maintenance		\$ 4,000
Furnishings clothing Closet Support		\$ 1,200
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 5,200
TOTAL EXPENDITURES (Sum of A, B & C)		\$

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY Southern Oregon Jobs with Justice

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$ 7,000	\$
Jackson County Funds	\$ 10,000	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify) Grants and Dedicated Donations	\$	\$ 30,000
SUB TOTALS	\$	\$
TOTAL REVENUE (Pending & Secured)		\$
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 14,400
Total Benefits		\$
TOTAL PERSONNEL SERVICES		\$ 14,400
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Program Expenses: Food and Supplies for daily community meals		\$ 24,000
Program Expenses: Gear and Direct Aid including housing assistance		\$ 11,000
Program Expenses: Emergency Weather Shelter Support		\$ 5,000
		\$
		\$
		\$
TOTAL MATERIALS & SERVICES		\$ 40,000
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment mobile kitchen operation and maintenance		\$ 4,000
Furnishings Clothing Closet Support		\$ 1,200
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 5,200
TOTAL EXPENDITURES (Sum of A, B & C)		\$

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

I.		# Whole Program	# Ashland
	Gender		
	Age*		
	Female	200	200
	Male	500	500
II.	Other	700	700
	Totals		
	0 to 5	10	10
	6 to 12	10	10
	13 to 17	10	10
	18 to 30	80	80
	31 to 40	150	150
	41 to 50	125	125
	51 to 61	100	100
	62 +	50	50
	Unknown	165	165
	Total	700	700

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland
White	450	50	450
Black/African American	50		50
American Indian/Alaskan Native	25		25
Native Hawaiian/other Pacific Islander	25		25
American Indian/Alaskan Native and White	0		0
Black/African American and White American	0		0
Indian/Alaskan Native and Black/African American	0		0
Other Multi Racial	75		75
Other	125		125
Totals	700	50	700

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Agency Board Profile

RECIPIENT AGENCY Southern Oregon Jobs with Justice

PROGRAM/PROJECT TITLE Ashland Community Peace Meal

1. **Number of board members required in bylaws?** Minimum 5 Maximum 9
2. **Number of board members currently active?** # Voting 7 Vacancies 2
3. **Average percentage board meeting attendance (over last completed year):** 60 %
4. **Percent of board in attendance required for a quorum:** 51 %
5. **List various board, advisory and ad hoc committees and the number of people on each.**

<i>Committee</i>	<i>Number of Members</i>
2200 Advisory Committee	1

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	6	
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other	1	
Totals	7	0

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Society of St. Vincent de Paul, Ashland/Talent Conference **DATE:** 02/06/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) St. Vincent de Paul, Our Lady of the Mountain Conference

ADDRESS 987 Hillview Drive, Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Keeping the utilities on in Ashland households

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Strategic Plan, Goal 5: "Seek opportunities to enable all citizens to meet basic needs."

AMOUNT REQUESTED from this funder for this program/project **2026-2027 \$** \$ 25,000

GRANT CONTACT (If other than Executive Director listed below)

Name Vicky Weiss

Telephone (541) 708-5173 **E-mail** vweiss590@gmail.com

EXECUTIVE DIRECTOR INFORMATION

Name Kathy Begley

Telephone (541) 826-5722 **E-mail** begley2001@aol.com

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Signature of Board President

SEE SEPARATE PAGE FOR BOTH SIGNATURES

Type Name

Signature of Executive Director/CEO

Kathy Begley

Type Name

City of Ashland Social Service Grant Program
Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: Society of St. Vincent de Paul, Ashland/Talent Conference **DATE:** 01/31/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) St. Vincent de Paul, Our Lady of the Mountain Conference

ADDRESS 987 Hillview Drive, Ashland Oregon 97520
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Keeping the utilities on in Ashland households

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? Strategic Plan, Goal 5: "Seek opportunities to enable all citizens to meet basic needs."

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ \$ 25,000

GRANT CONTACT (If other than Executive Director listed below)

Name Vicky Weiss
Telephone (541) 708-5173 **E-mail** vweiss590@gmail.com

EXECUTIVE DIRECTOR INFORMATION

Name Kathy Begley
Telephone (541) 826-5722 **E-mail** begley2001@aol.com

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

[Signature of Kathy Begley]
Signature of Board President

Kathy Begley
Type Name

[Signature of Kathy Begley]
Signature of Executive Director/CEO

Kathy Begley
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

1. **Program/project is:** new ☐ established/continuing ☒
 pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
This grant will be used to help keep utilities on in residences of those living in Ashland.
3. What will this funding enable?
Funding of this initiative will allow us to aid approximately 100 households with their utility bills. Calls for assistance with utilities currently exceed anything we have seen in the past, and the amounts owed are larger than we have ever seen before. While our St. Vincent de Paul volunteers came to the aid of over 1200 individuals during 2025, helping with a variety of needs, nearly 20% of our budget (over \$40,000) went to utility payments. More than half of that sum went directly to
4. Number of volunteers this program/project will engage: 16
Number of paid program employees this program/project will engage: 0
5. Total number volunteer's agency utilizes: 29*
Total number of paid agency employees: 0
6. Outline key strategies of the project/program with timeline and staff structure.
Though our organization helps those in need in a variety of ways, keeping people safely housed in Ashland is our number one priority. In our last fiscal year, 95% of our budget was spent on keeping people housed, housing deposits, and utility costs. Our volunteers answer our helpline and work in teams of two five days a week from 9:30 AM until 4:00 PM, addressing the needs of those who call on us. We come to the aid of callers once per year (not wanting anyone to become dependent upon our assistance) with a set amount offered. When our financial assistance is insufficient to meet a caller's need, we reach out to other agencies. (Each volunteer is equipped with a seventeen-page list of other organizations offering assistance with specific information about the kind of assistance offered), and our twice monthly meetings allow us to keep up to date on what other agencies are offering.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.
St. Vincent de Paul meets a crucial need for the citizens of Ashland: the ability to offer same-day assistance when necessary. No other social service organization in our area is able to respond at the "eleventh hour" to the needs of those who call. We are effectively an emergency helpline, and other social service organizations know this. They routinely direct those with pressing needs to us. (On any given day on the helpline as many as half the calls will be from other agencies seeking assistance for their clients.)

*This number includes those who serve as translators and accountants only.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?
3. How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)

1. a. The Rogue Valley District Council of St. Vincent de Paul is dedicated to providing compassionate, prompt support and care to the poor and needy in Jackson County, regardless of age, race, religion, creed, sex, sexual preference or ethnic origin. Although the Society's name is recognized around the world, each Council is locally organized, funded, and staffed. Our Council has no financial connection or obligation to any church; no effort is made to preach, convert, or proselytize. Our Council was established in 1982 and has nine operating divisions or conferences, of which the Ashland/Talent Home Visit Conference is one. Because we have no paid employees and rely on volunteers to deliver all of our services, all of the funds we obtain are used to help those in need in Ashland and Talent as we offer a wide array of services. Because we have worked in the Ashland and Talent area for so long and work so closely with a host of other agencies, we are well known. Many of our volunteers have worked with us for many years, so we have established networks that allow us to seek additional aid for individuals and families when it is needed. We also have Spanish speakers available to assist with non-English speakers.

b. We are unique in that we are the only entity serving Ashland that offers same-day assistance to those in need. Many of those who call on us do so at the "eleventh hour" when they are facing same-day shut-offs. Because our helpline is staffed from 9:30 AM until 4:00 PM five days a week, we are there to receive calls not only from those in need but also from other service agencies dealing with clients. They call, knowing we are able to provide same-day assistance.

c. In our work we encounter clients from a wide range of diverse backgrounds and experiences. The Rule of St. Vincent de Paul and our ongoing training enable us to be sensitive to the impact upon our clients of both overt discrimination and micro-aggressions. We endeavor to be a deeply respectful and supportive presence in their lives, while providing assistance in difficult times. Our volunteers meet bi-monthly to discuss difficult cases, to receive additional training, and to review our Rule and Manual outlining the practice of trauma-informed care. While we work closely with Jackson County Mental Health, our volunteers are all provided with a written list of "Crisis De-Escalation Techniques," which are very helpful.

2. a. St. Vincent de Paul seeks funding to address the City Council's strategic plan, Goal 5: "Seek opportunities to enable all citizens to meet basic needs." When the Covid pandemic struck, it affected everyone but especially those residents living below the poverty level. As the city of Ashland struggled, the city utility office closed and shut-offs were suspended, giving those struggling a reprieve.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

Continue from previous page (if needed):

When the pandemic subsided, the office needed time to train new staff, and utility bills continued to accrue without penalty. But as city services have come back, many residents have found themselves owing huge sums to the city in order to keep electricity on and water flowing. Our helpline volunteers—many with long histories of working as volunteers with our St. Vincent de Paul—have never before encountered callers with utility bills this large. It is not at all unusual to hear from residents owing bills in the thousands and facing immediate shut-offs.

We may be amazed by these huge sums, but as struggling families attempted to stay fed and safely housed, they practiced “triage.” While the utility office was closed, it was a case of “out of sight; out of mind.” Families dealt with immediate needs. Since the pandemic, the city has put in place additional assistance measures to help those who need them, and we make sure that callers are aware of these new assistance measures as we offer them financial assistance.

This Social Services grant request will enable us to come to the aid of struggling families and individuals (many of these senior citizens on fixed incomes) who tend to call on us when they are facing immediate utility shut-offs. That point noted, we allow households to call on us just once a year and set a financial limit on the amount we provide so that people do not become dependent upon our assistance, and we are thus able to help many individuals. When the need exceeds our financial limits, we work closely with other agencies to obtain the additional assistance callers need.

2. b. This proposal does not exactly propose a “strategy for change,” but our efforts in the past year have definitely been enhanced. Since the federal government has cut back on its safety net programs, nonprofits have in many cases adjusted their funding priorities. In the face of this shifting landscape, the president of our conference has assigned individual volunteers to serve as direct liaisons to other social service organizations. (I myself am the liaison to the Salvation Army.) This system allows us to keep up to date on the assistance being offered by other agencies with which we cooperate regularly.

2. c. and d. Proof of the efficacy of our efforts lies in the number of families and individuals able to stay warm with the lights on and water flowing. We have a robust computer system that allows easy access to the records of those we help with detailed information about the circumstances facing the caller along with a record of any financial assistance we have provided in the past. As noted, callers are able to seek our assistance once per year with a limit set on the amount. Our volunteers are able to exceed these financial limits in extreme circumstances.

3. Our city benefits from the work we do because we are that singular emergency entity keeping our most vulnerable residents safely housed and their utilities operational. Our volunteers are routinely called by other agencies to help those whom they are assisting. (These include OHRA, ACCESS, United Way, Salvation Army, Goodwill, Maslow, local churches, etc.) When the need of a caller exceeds our financial resources, we call upon these other agencies to help. Every one of our volunteers receives six months of training, “shadowing” volunteers who work the helpline; every volunteer is equipped with a seventeen-page list of resources organized by category of assistance and complete with hours, location, and specifics regarding the assistance rendered. Every volunteer works with a partner and has access to our experienced volunteers familiar with the work we do and the many agencies with which we cooperate.

Please note that while we are under the umbrella organization of the St. Vincent de Paul Council, based in Medford, and receive some support from them, we do most of our own fundraising. All of the funds we obtain are expended solely in Ashland and Talent. Funds obtained with this grant will be used solely in Ashland.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 10/2024-09/2025

b. Administration & Fundraising expense: \$ 1,027 .5 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 42,958

d. **Total expenses:** \$ 193,853

e. Sources of **revenue:**

Memberships/ individual contributions \$ 96,000 47 %

Raised through fundraising activities \$ 90,811 43 %

Government \$ 0 0 %

Foundations \$ 18,500 9 %

United Way \$ 0 0 %

Fees for Service \$ 0 0 %

Other (reimbursements, payments, bequests, etc.) \$ 3,554 1 %

f. **Total revenue:** \$ 208,865

2. What is the highest level of financial reporting required by your funders?
990 (from Medford Council, available upon request)

3. Briefly describe your sustainability outlook for the project/program in the future.

The Manual of the Society of St. Vincent de Paul, p. 26: "Surplus funds should be shared generously with more needy Conferences or the special works of the District Council." That stipulation noted, we make it a practice to maintain approximately 25% of our revenue in our accounts. If it looks as though we are in danger of going below that amount, we lower the amount we are able to provide to those who call on us and work with callers, advising them on other sources of assistance.

4. a. Total organizational annual budget **current ongoing** fiscal year: 215,000

b. Total program/project budget current ongoing fiscal year: 50,500

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference--SEE ATTACHED SHEET

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify) Council	\$	\$
SUB TOTALS	\$	\$
TOTAL REVENUE (Pending & Secured)		\$
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 0
Total Benefits		\$ 0
		\$
TOTAL PERSONNEL SERVICES		
B.MATERIALS & SERVICES: (please detail other major budget categories)		
		\$
		\$
		\$
		\$
		\$
		\$
TOTAL MATERIALS & SERVICES		\$ 0
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$
TOTAL EXPENDITURES (Sum of A, B & C)		\$

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$	\$
City of Ashland Funds	\$ 25,000	\$
Jackson County Funds	\$	\$
CDBG (identify)	\$	\$
Other State or Federal Funds	\$	\$
United Way Funds	\$	\$
Other Funds (identify) grants, donations, collections	\$ 25,000	\$ 21,120
SUB TOTALS	\$	\$
TOTAL REVENUE (Pending & Secured)	\$50,000	\$21,120
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries		\$ 0
Total Benefits		\$ 0
TOTAL PERSONNEL SERVICES		\$ 0
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Office Supplies		\$ 312
Miscellaneous (phone, bank services)		\$ 120
		\$
		\$
		\$
		\$
TOTAL MATERIALS & SERVICES		\$ 432
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$ 0
TOTAL EXPENDITURES (Sum of A, B & C)		\$

CURRENT MEMBER/CLIENT DEMOGRAPHIC PROFILE

(Use absolute numbers only – no percentages.)

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

I.		# Whole Program	# Ashland
	Gender		
	Age*		
	Female	582	398
	Male	286	202
	Other	145	77
II.	Totals		
	0 to 5	84	39
	6 to 12	119	79
	13 to 17	80	51
	18 to 30	161	98
	31 to 40	176	125
	41 to 50	128	89
	51 to 61	151	100
	62 +	127	96
	Unknown	1026	677
	Total		

*at point of entry for service

IV. Race/Ethnicity

	#Whole Program	Ethnicity Hispanic/Latino*	# Ashland
White			
Black/African American			
American Indian/Alaskan Native			
Native Hawaiian/other Pacific Islander			
American Indian/Alaskan Native and White			
Black/African American and White American			
Indian/Alaskan Native and Black/African American			
Other Multi Racial			
Other			
Totals			

Ethnicity is a portion of each Race category listed and will likely not match the total demographic served – it would only match if 100% of your clients identify as Hispanic/Latino.

Our St. Vincent de Paul keeps meticulous records. These show that during 2025, we came to the aid of over 1200 individuals. Asking callers in distress for the particular kinds of demographic details listed above often feels intrusive. Our callers are people in need who experience indignities of every sort, every day. We do all we can not to contribute to their distress. The gender and age numbers above are those we have obtained when it has been possible to do so. We do NOT collect ethnic nor racial information from those we help.

Note: for some reason, this electronic form will not allow me to total the gender and age categories above, nor will it allow me to list the total of the expenditures on the previous page.

Agency Board Profile

RECIPIENT AGENCY St. Vincent de Paul, Ashland/Talent Conference (The Board is that of our Rogue Valley Council)

PROGRAM/PROJECT TITLE Keeping Utilities on in Ashland households

1. **Number of board members required in bylaws?** Minimum 21 Maximum 30
2. **Number of board members currently active?** # Voting 21 Vacancies 0
3. **Average percentage board meeting attendance (over last completed year):** 75 %
4. **Percent of board in attendance required for a quorum:** 51 %
5. **List various board, advisory and ad hoc committees and the number of people on each.**

<i>Committee</i>	<i>Number of Members</i>
Executive Committee	6

6. **Characteristics of Board of Directors at time of application:**

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	20	1
Black/African American		
American Indian/Alaskan Native		
Native Hawaiian/other Pacific Islander		
American Indian/Alaskan Native and White		
Black/African American and White		
American Indian/Alaskan Native and Black/African American		
Other Multi Racial		
Other		
Totals	20	1

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

Organizational Chart

Council Board of Directors and Conference Presidents

Council President Kathy Begley

h 541-826-5722 c 541-951-6012
email: begley2001@aol.com

Board Secretary

Nancy Fleming
C 860-693-3891
H 541-499-6466

Executive Committee

Dennis Mihocko
c 541-531-3832

Len Hebert
c 541-944-6950

Rich Hansen
h 541-770-6062
c 541-261-6855

Tom Fleming
h 541-499-6466
c 541-531-1158

Socorro Holloway
h 541-776-4138

Kathy Begley
c 541-951-6012
c 541-821-5953

Don Krolak
c: 916-225-0223

VP Facilities

Dennis Mihocko
c 541-531-3832

VP Grants

Jay Stockton
H 541-664-3223
C 541 261-9475

Treasurer

Tom Fleming
h 541-499-6466

Volunteer Coordinator

Kathy Ascuena
541 664-3211

Publicity

Michael Morgan
c 503-781-9216

Spirituality

Fr Jim Clifford
c 541-944-3536

Conferences

1-SocSvc Sacred Heart

Pres: Marilyn Gradwell
h 541-944-3985
VP: Fr. Jim Clifford, VP
541-944-3536

Treasurer:
Anita Chester
h:541-512-9684
c:541-890-1147

2-Store Blessed Anna Maria

Pres: Ralph Browning
c 541-261-0866
VP: Jackie Cavanaugh
h 541-772-8359
MGR: Karen McNeilly
h 541-855-2008

Treasurer:
Bunny Grimes
541-779-5807

3-Kitchen St. Teresa

Co-Pres: Helen Smith
h 541-512-9153
Bruce Pellecchia
541 840-7694
MGR: Charlotte Martinson
H:541- 499-8992

Treasurer:
Charlotte Martinson
h:541-499-8992

4-Urban Rest Stop St. Francis of Assisi

Pres:
Jerry Pendzick
c 619-823-2129

Treasurer:

5-Office St. Anna

Pres: Nancy Fleming
h 541-499-6466
c 860-693-3891

Treasurer:
Nancy Fleming
h 541-499-6466
c:860-693-3891

6-Ashland SServ Our Lady of the Mountain

Pres:
Claudia Van Dyke
458-246-9000

Treasurer:
John Engelhardt
541-324-9541

7-Pantry Shepherd of the Valley

Pres: Vacant
MGR: Beth Hunter
h 541-664-3481
Glen Cote
c 541-261-8322

Treasurer:
Gwen Matocha
541-773-6849

8- Family Shelter St. Anthony

Pres: Dennis Mihocko
c 541-531-3832
MGR: Nick Koutsouros
c541-778-8104

Treasurer:
Socorro Holloway
c: 541-821-5953

9-HomeVisits/ MedAssist St. Augustine

Pres: Don Krolak c 916-225-0223

Treasurer:
C Forsythe
h 541-732-0668
c 541-282-4575

Internal Revenue Service
District Director

Department of the Treasury

P O Box 2350 Room 5137
Los Angeles, CA 90053

Date: DEC. 15, 1986

SOCIETY OF ST VINCENT DE PAUL
ROGUE VALLEY COUNCIL
PO BOX 1663
MEDFORD, OR 97501

Employer Identification Number:

Case Number:

Contact Person:

KORELL, ANTOINETTE

Contact Telephone Number:
(213) 894-4405

Our Letter Dated:

Aug. 29, 1984

Caveat Applies:

no

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi). Your exempt status under section 501(c)(3) of the code is still in effect.

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes a notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(1) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If the heading of this letter indicates that a caveat applies, the caveat below or on the enclosure is an integral part of this letter.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



Frederick C. Nielsen
District Director

Letter 1050(CG)

Society of St. Vincent de Paul
Rogue Valley Council
Conference No. 6 OUR LADY OF THE MOUNTAIN

Budget

Upcoming Fiscal Year

Income

**Budget
FY25-26**

Support from Council	\$88,000
Donations	
Collections	\$47,000
Other Donations	\$30,000
Grants Received	\$50,000
Miscellaneous	\$0
Refunds	\$0

Total	\$215,000
--------------	------------------

Expenses

Operating Expenses

Office Supplies	\$1,300
Miscellaneous (Phone service, bank	\$500
Total	\$1,800

Neighbor Expenses

Utilities	\$50,500
Motel	\$1,000
Housing Deposit	\$14,000
Mortgage	\$2,000
Transportation	\$1,850
Insurance & Registration	\$1,200
IDs & Birth Certificates	\$600
Phone	\$350
Rent	\$135,000
Car Repair	\$3,000
Medical	\$700
Other (Clothing, household, etc.)	\$3,000

Total	\$213,200
--------------	------------------

<i>Difference between Income & Expenses</i>	\$0
--	------------

NOTES

City of Ashland Social Service Grant Program

Application and Forms



2026 - 2027

ORGANIZATION LEGAL NAME: United Way of Jackson County, Inc. **DATE:** 02/09/26

OTHER NAMES ORGANIZATION KNOWN BY (DBA) _____

ADDRESS 60 Hawthorne Street, Medford, OR 97504
Street City State Zip

FEDERAL EMPLOYER ID NUMBER (FEIN) [REDACTED]

PROGRAM/PROJECT TITLE: Hope Chest

See MEMO for important information on goals and priorities for Ashland.

Which strategic priority does your program focus? All five

AMOUNT REQUESTED from this funder for this program/project 2026-2027 \$ \$ 20,000

GRANT CONTACT (If other than Executive Director listed below)

Name Bethany Raya

Telephone (541) 773-5339 **E-mail** bethany@unitedwayofjacksoncounty.org

EXECUTIVE DIRECTOR INFORMATION

Name Dee Anne Everson

Telephone (541) 773-5339 **E-mail** deeanne@unitedwayofjacksoncounty.org

CERTIFICATION

The information contained in this application is true and correct to the best of my knowledge.

Cathy Noah
Signature of Board President

Cathy Noah
Type Name

[Signature]
Signature of Executive Director/CEO

Dee Anne Everson
Type Name

SUMMARY INFORMATION

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

1. Program/project is: new ☐ established/continuing ☒
pilot ☐ If pilot, expected duration _____
2. Primary geographic location and population program funding will serve. *(If funding awarded City of Ashland, will require tracking the number of city residents served for reporting purposes.*
Ashland, Oregon residents. We do not have parameters around who can access our services, provided the resident is referred to us via a case worker or social worker.
3. What will this funding enable?
Hope Chest provided support to 481 households in fiscal year 2025. The funding we are seeking will allow us to strengthen and broaden these essential services, ensuring that more residents receive timely and effective assistance. This investment will directly enhance the quality of life for vulnerable individuals and families, helping them move toward financial stability and improved well-being.
4. Number of volunteers this program/project will engage: 0
Number of paid program employees this program/project will engage: 3
5. Total number volunteer's agency utilizes: 1500
Total number of paid agency employees: 7
6. Outline key strategies of the project/program with timeline and staff structure.
Hope Chest works to address the financial challenges so many in our community face by providing low-to-no-barrier emergency funding up to \$500. These funds are made payable to the vendor, such as the utility company, cell phone provider, landlord, etc. Community members are referred to us via their case worker, social worker, or similar professional. Since 2008, we've helped alleviate the toxic stress many individuals face, empowering them to retain employment, secure housing, access medical care, and cover other essential expenses. Once a referral is submitted funds are generally issued with 24-48 business hours and are facilitated by one staff person.
7. Use this space for comments, explanations, and exceptions to questions on this application that can't be included within the question format. You may also leave it blank.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

*Answer all three narrative questions. Use **only the space provided** – place the question number and letter preceding each answer; the amount of space you allot for each response is your choice.*

Description of organization (include inception date) and

- a. mission statement, purpose(s) and how this program/project fits with your mission.
 - b. your organization's unique qualifications to accomplish your program outcomes?
 - c. what approach is your agency taking to serve clients and train staff on trauma informed care?
2. What:
- a. issues(s) is the project/program intended to impact,
 - b. strategy for change your program will be based on,
 - c. evidence that the project/program will be successful in the proposed setting, and
 - d. what tool(s) will you use to measure outcomes?

3. **How would the community as a whole benefit if your program receives funding? (Include a description of collaborations and integration and the role program/project plays in the sector.)**

1a. United Way of Jackson County's mission is mobilizing caring to affect change, and our vision is creating positive community change. We focus on the building blocks of a good life: youth opportunity, financial mobility, healthy community, and community resiliency. Guided by our core values of community, compassion, empowerment, vision, integrity, and inclusion, we work to make a lasting impact for individuals and families in need.

Our youth opportunity goal is to remove barriers from early childhood to successful adulthood and we fund nine programs and collaborations. Our healthy community goal is to maximize wellness, knowing that it can be different for each person. We fund 16 different programs and four initiatives to advance the work. Our community resiliency work focuses on removing barriers for those with low incomes, aging, and people with disabilities to get where they want and need to go, as well as our disaster work and environmental sustainability. We fund two programs and two initiatives including launching the nation's only free wheelchair charging station network county-wide. Our financial mobility impact area is to move families forward by reducing toxic stress with Hope Chest investments to pay a bill that creates an obstacle to their success. We fund seven programs and four initiatives focused on financial mobility.

We prepare income taxes for free with both Volunteer Income Tax Assistance and Facilitated Self-Assistance, which is how people maximize their refund, directly improving their lives. Our program funding serves two out of three people in our county and our impact work serves all of Jackson County.

1b. United Way of Jackson County has 15 committees and councils that are focused on areas ranging from finance and investment, disaster resiliency, income and health, and public policy. We have a board of 31 with members representing business sectors, health, nonprofits, and government organizations. Our volunteer base includes 1,500 active community members. All of which makes the work of United Way possible. In terms of Hope Chest, 75 distinct agencies referred their clients to us during fiscal year 2025. This shows that United Way is trusted and relied upon when it comes to addressing urgent community needs.

1c. For an individual to access Hope Chest funds we require a referral by a case worker, social worker, or similar professional that has worked with the client, has vetted the situation, and is providing other services to help ensure their success. One of the reasons we work with agencies instead of directly with clients is we do not want to re-traumatize individuals with being shuffled around and having to tell their stories multiple times.

AGENCY AND PROGRAM/PROJECT NARRATIVE

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

Continue from previous page (if needed):

2a. In our community, even a necessary car repair can jeopardize employment and lead to housing instability for those living on the edge. Since its inception in 2008, our services have helped families avoid eviction, manage medical expenses, navigate legal challenges, and maintain reliable transportation—all essential factors for maintaining stability and fostering upward mobility.

2b. Part of the DNA of our organization is to create change, and while \$500 in financial assistance does not solve any root causes, it does certainly help reduce the toxic stress that so many in our community face. Reducing toxic stress enables our community members to build stronger social connections, improves emotional regulation, and leads to overall better physical health.

2c. Having operated for the last 18 years, Hope Chest is making a real difference in the lives of our community members. While we do not interact directly with the community members needing assistance we often receive thank you notes detailing how our financial assistance made a difference in their lives. Additionally, we have several letters of support from agencies such as the Housing Authority of Jackson County, OHRA, and the Teresa McCormick Center.

2d. Hope Chest measures success through a variety of key metrics, including the number of clients served, referring partners, and the average amount and type of assistance provided. Operating on a referral-only basis, we ensure payments are made directly to vendors. Our documentation includes essential client details such as name, referring agency, required amount, type of need, as well as additional information like income source, household size, number of children, and any disabilities. Each quarter, United Way assesses the impact of Hope Chest by reviewing remaining funds, the number of individuals and families helped, the referring agencies, and collecting success stories from recipients who are willing to share their experiences.

3. At its core, United Way of Jackson County believes people are connected and interdependent. When we reach out a hand to one, we influence the condition of all. We all win when children form healthy attachments through a loving family, when they succeed in school, graduate and make successful transitions to adult responsibilities. We all win when families are financially stable, when people have good health, and when people are engaged and connected.

While there are several agencies in the Valley that assist children and families with common expenses like rent and utilities, we are one of the only organizations offering support for less typical needs, such as car repairs, childcare costs, medical and mental health expenses, cell phone bills, dietary-specific food subscriptions, and other hard-to-cover areas. Additionally, we pride ourselves on having the fastest turnaround times in the region—once a referral is made, we can issue and mail a check within 24-48 business hours. We understand the challenges of red tape and bureaucratic delays and work diligently to minimize these while ensuring our practices remain sound. In 2025, we received referrals from 72 distinct agencies, including the Teresa McCormick Center, ACCESS, Head Start, law enforcement, local school districts, and churches. These partners consistently recognize us as the agency with the quickest response time and often the only one able to meet the specific needs of individuals. We are committed to nurturing our existing relationships with referring organizations while also expanding our network to better serve the community.

GENERAL FINANCIAL INFORMATION

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

1. For most **recently completed** 990:

a. FISCAL YEAR (mm/yyyy – mm/yyyy): 07/2024 - 6/2025

b. Administration & Fundraising expense: \$ 450,465.00 20 %

Administration & Fundraising (expressed as percent of total budget - also known as management and general, that portion of your expenses not dedicated solely to program or services), calculated directly from your IRS form 990. Part IX: Add Line 25 C (administrative cost total) and Line 25 D (fundraising cost total) and divide by Part IX, Line 25, Column A (total expenses).

c. Program expense \$ 1,815,510.00

d. **Total expenses:** \$ 2,265,975.00

e. Sources of **revenue**:

Memberships/ individual contributions \$ 1,169,814.00 57 %

Raised through fundraising activities \$ 0.00 0 %

Government \$ 308,813.00 15 %

Foundations \$ 416,651.00 20 %

United Way \$ 0.00 0 %

Fees for Service \$ 0.00 0 %

Other (reimbursements, payments, bequests, etc.) \$ 145,882.00 7 %

f. **Total revenue:** \$ 2,041,160.00

2. What is the highest level of financial reporting required by your funders?
Audit

3. Briefly describe your sustainability outlook for the project/program in the future.
We will continue to apply for grants to sustain this program. Hope Chest has been in existence since 2008 and will remain for the foreseeable future.

4. a. Total organizational annual budget **current ongoing** fiscal year: 1,928,015.00

b. Total program/project budget current ongoing fiscal year: 275,000.00

ORGANIZATION BUDGET 2026-27*

PROJECT PERIOD July 1, 2026, to June 30, 2027(*If Applicable)

RECIPIENT AGENCY United Way of Jackson County

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$0.00	\$0.00
City of Ashland Funds	\$0.00	\$0.00
Jackson County Funds	\$0.00	\$0.00
CDBG (identify)	\$0.00	\$0.00
Other State or Federal Funds	\$0.00	\$115,000.00
United Way Funds	\$0.00	\$0.00
Other Funds (identify) See budget	\$0.00	\$1,763,564.00
SUB TOTALS	\$0.00	\$1,878,564.00
TOTAL REVENUE (Pending & Secured)		\$1,878,564.00
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries (We do not separate these expenditures)		\$
Total Benefits		\$
TOTAL PERSONNEL SERVICES		\$710,000.00
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Restricted grants		\$500,000.00
Allocations		\$250,000.00
Operations (office, dues, supplies, phones, etc.)		\$409,815.00
		\$
		\$
		\$
TOTAL MATERIALS & SERVICES		\$1,159,815.00
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$0
TOTAL EXPENDITURES (Sum of A, B & C)	\$1,869,815.00	\$

PROGRAM BUDGET 2026-27*

PROJECT PERIOD July 1, 2026 to June 30, 2027 (*If Applicable)

RECIPIENT AGENCY United Way of Jackson County

REVENUE	Pending Commitments	Secured Commitments
City of Medford Funds	\$20,000.00	\$0.00
City of Ashland Funds	\$20,000.00	\$0.00
Jackson County Funds	\$0.00	\$0.00
CDBG (identify)	\$0.00	\$0.00
Other State or Federal Funds	\$0.00	\$0.00
United Way Funds	\$0.00	\$0.00
Other Funds (identify)	\$15,000.00	\$220,000.00
SUB TOTALS	\$55,000.00	\$220,000.00
TOTAL REVENUE (Pending & Secured)		\$275,000.00
EXPENDITURES		
A.PERSONNEL SERVICES		
Total Salaries (We do not separate these expenditures)		\$27,500.00
Total Benefits		\$
TOTAL PERSONNEL SERVICES		\$27,500.00
B.MATERIALS & SERVICES: (please detail other major budget categories)		
Hope Chest vendors		\$247,500.00
		\$
		\$
		\$
		\$
		\$
TOTAL MATERIALS & SERVICES		\$247,500.00
C.CAPITAL OUTLAY (must constitute part or all of funded public service activity to be eligible expense)		
Equipment		\$
Furnishings		\$
Other capital expenses /Identify:		\$
TOTAL CAPITAL OUTLAY		\$0
TOTAL EXPENDITURES (Sum of A, B & C)	\$275,000.00	\$

(Use absolute numbers only – no percentages.)

PROGRAM/PROJECT TITLE Hope Chest

	# Whole Program	# Ashland
1. <i>Programs</i>	10	10
2. <i>Programs</i>	10	10
3. <i>Programs</i>	10	10
4. <i>Programs</i>	10	10
5. <i>Programs</i>	10	10
6. <i>Programs</i>	10	10
7. <i>Programs</i>	10	10
8. <i>Programs</i>	10	10
9. <i>Programs</i>	10	10
10. <i>Programs</i>	10	10
11. <i>Programs</i>	10	10
12. <i>Programs</i>	10	10
13. <i>Programs</i>	10	10
14. <i>Programs</i>	10	10
15. <i>Programs</i>	10	10
16. <i>Programs</i>	10	10
17. <i>Programs</i>	10	10
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19. <i>Programs</i>	10	10
20. <i>Programs</i>	10	10
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23. <i>Programs</i>	10	10
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83. <i>Programs</i>	10	10
84. <i>Programs</i>	10	10
85. <i>Programs</i>	10	10
86. <i>Programs</i>	10	10
87. <i>Programs</i>	10	10
88. <i>Programs</i>	10	10
89. <i>Programs</i>	10	10
90. <i>Programs</i>	10	10
91. <i>Programs</i>	10	10
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98. <i>Programs</i>	10	10
99. <i>Programs</i>	10	10
100. <i>Programs</i>	10	10
101. <i>Programs</i>	10	10
102. <i>Programs</i>	10	10
103. <i>Programs</i>	10	10
104. <i>Programs</i>	10	10

44 (Other 5)

15

64

Totals

3

13

22

16

64

IV. Race/Ethnicity

IV. Race/Ethnicity

#

Ashland

46

6

5

2

100

1

60

Agency Board Profile

RECIPIENT AGENCY United Way of Jackson County

PROGRAM/PROJECT TITLE Hope Chest

1. Number of board members required in bylaws? Minimum 23 Maximum 35
2. Number of board members currently active? # Voting 31 Vacancies 0
3. Average percentage board meeting attendance (over last completed year): 89 %
4. Percent of board in attendance required for a quorum: 51 %
5. List various board, advisory and ad hoc committees and the number of people on each.

<i>Committee</i>	<i>Number of Members</i>
Executive Committee	<u>10</u>
Finance Committee	<u>12</u>
Income and Health Committee	<u>18</u>
Public Policy Council	<u>11</u>
Strategic Visioning	<u>9</u>

6. Characteristics of Board of Directors at time of application:

Race/Ethnicity

	<i>Number Identifying</i>	<i>Ethnicity Hispanic/Latino*</i>
White	<u>29</u>	<u></u>
Black/African American	<u>1</u>	<u></u>
American Indian/Alaskan Native	<u></u>	<u></u>
Native Hawaiian/other Pacific Islander	<u></u>	<u></u>
American Indian/Alaskan Native and White	<u></u>	<u></u>
Black/African American and White	<u>1</u>	<u></u>
American Indian/Alaskan Native and Black/African American	<u></u>	<u></u>
Other Multi Racial	<u></u>	<u></u>
Other	<u></u>	<u>3</u>
Totals	<u>31</u>	<u>3</u>

* Fill out this column pertaining to board Ethnicity is a portion of each Race category listed. It will very likely not match the total board category – it would only match if 100% of your board identifies as Hispanic/Latino.

2025-26 Board of Directors

As of January 27, 2026

Erick Acosta

Road to Success
16 N Riverside Ave, Suite 208
Medford, OR 97501
(541) 951-0740 C
acostaeric23@gmail.com

Angela Beeks

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(541) 608-0564 W
Angela.beeks@thehumanbean.com

Amy Belkin

Teresa McCormick Center
Harry & David
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Joshua Blesse

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Charley Bolen

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Brande Cowden

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Brenda Doggett

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Chris DuBose

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Steve Erb

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Dee Anne Everson (STAFF)

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Ed Felan

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Penny Garrett

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Anne Golden

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Lisa Greif

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Jeffrey Hollister

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Beth Lindsay
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Frank Lucas
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Robb Mayers
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Laura Millette
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Jessica Murrey
Wicked Saints Studios
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jess@wicked saints.studio

Tiffany Nelson
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Medford, OR 97504
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(541) 326-1107 C
Tiffany.m.nelson@providence.org

Cathy Noah (BD PRES.)
(541) 890-4426 C
Cnoah582@gmail.com

DL Richardson
Black Southern Oregon Alliance
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Belle Shepherd
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Sue Slack
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Rebecca Smith
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beckiboo59@gmail.com

Becky Snyder
(541) 601-1987 C
beckymom26123@gmail.com

Dan Thorndike
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biciloco@medfab.com

Eric Torrey

AmeriTitle

850 O'Hare Parkway Suite 102

Medford, OR 97504

(541) 779-7660 W

Eric.torrey@amerititle.com**Cooper Whitman**

Pacific Power

925 S. Grape Street

Medford, OR 97501

(541) 776-5406 W

Cooper.Whitman@PacifiCorp.com**PRESIDENT: Cathy Noah****STAFF: Dee Anne Everson**

RECEIVED JUN 23 1995

Internal Revenue Service

Department of the Treasury

District
Director

P.O. Box 2350 Los Angeles, Calif. 90053

United Way of Jackson County, Inc.
Post Office Box 4664
Medford, OR 97501-0188

Gilda Lewis
Person to Contact:

(213) 894-2336
Telephone Number:

EO 61495
Refer Reply to:

June 21, 1995
Date:

EIN: [REDACTED]

Dear Taxpayer:

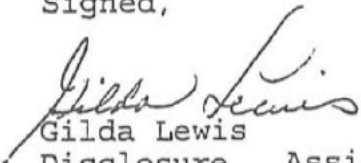
This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate that this organization was recognized to be exempt from Federal income tax in July 1969 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of the Code, because it is an organization described in Section 170(b)(1)(A)(vi).

The exempt status for the determination letter issued in July 1972 continues to be effect.

If you need further assistance, please contact our office at the above address or telephone number.

Signed,


Gilda Lewis
Disclosure Assistant

United Way of Jackson Co., Inc.
2025-2026 Budget

2025-26
APPROVED
Budget

Ordinary Income/Expense

Income	
4005 · CAMPAIGN REVENUE	1,300,000
4006 · THIRD PARTY PAYER CONTRA INCOME	-140,000
4007 · DESIGNATIONS - CONTRA INCOME	-14,000
4206 · CAMPAIGN GRANTS RESTRICTED	625,000
4208 · WILL CAMPAIGN RESTRICTED	60,000
4120 · INVESTMENT INCOME	0
4242 · INTEREST INCOME	0
4195 · MEETING / EVENT REVENUE	3,500
4239 · MISCELLANEOUS INCOME	500
4345 · GIFTS IN KIND	15,000
4098 · TRANSFER FROM ENDOWMENT	28,564
4405 · DESIGNATIONS to UW	0
4145 · BEQUEST	0
Total Income	1,878,564
Gross Profit	1,878,564
Expense	
6555 · SALARIES & BENEFITS	710,000
7300 · PROFESSIONAL SERVICES	29,000
7345 · SUPPLIES/PRINTING	22,500
7350 · CFD CAMPAIGN EXPENSES	600
7409 · OFFICE EXPENSE	57,000
7434 · IT EXPENSE	16,000
7450 · ADVERTISING EXPENSE	25,000
7459 · BUSINESS INSURANCE	8,000
7464 · FEES	15,000
7504 · TRAINING & MEETINGS	25,000
7529 · OTHER EXPENSES	250
7645 · UNCOLLECTABLE PLEDGES	25,000
7695 · DEPRECIATION	35,000
8000 · ALLOCATIONS	250,000
8988 · FIRE ASSISTANCE	50,000
8401 · RESTRICTED GRANT EXPENSE	500,000
8900 · UNITED WAY DUES	27,465
8945 · COMMUNITY BUILDING EXPENSE	25,000
8960 · DAY OF CARING	12,000
8961 · WILL EXPENSE	20,000
8980 · PUBLIC AWARENESS	5,000
8999 · BUILDING EXPENSE	12,000
Total Expense	1,869,815
Net Ordinary Income	8,749

United Way of Jackson Co., Inc.
2025-2026 Budget

2025-26
APPROVED
Budget

Other Income/Expense

Other Income

4600 · CAPITAL CAMPAIGN	0
4096 · INVESTMENT ACCT CHG IN VALUE	0
4097 · CHANGE IN TRUST VALUE	0
Total Other Income	0
Net Other Income	0
Net Income	8,749

Hope Chest Budget 2026-27

Income	Budget	Pending	Secured
City of Medford	20,000.00	x	
City of Ashland	20,000.00	x	
Ames Fluhrer Fund OCF	25,000.00		x
Anna May Family Foundation	10,000.00		x
Carrico Family Foundation	75,000.00		x
Chaney Family Foundation	5,000.00		x
DeBoer Family Foundation	2,500.00		x
Individual Donors	45,000.00		x
Leightman Maxey Foundation	15,000.00	x	
Naumes Family Foundation	7,500.00		x
Roundhouse Foundation	15,000.00		x
Walker Fund of OCF	75,000.00		x
Total	<u>275,000.00</u>		

Expense	
Administrative Expense	27,500.00
Vendors	<u>247,500.00</u>
Total	<u>275,000.00</u>

Note:

1. Hope Chest is charged 10% administrative expense.
2. If less funds are raised, less funds are distributed.

Memo

DATE: February 26, 2026

TO: Housing and Human Services Advisory Committee

FROM: Linda Reid, Housing Program Manager

DEPT: Planning

RE: Discussion of Long-Term Occupancy of Recreational Vehicles and Tiny Houses in Single Family Neighborhoods.

At a [City Council Study Session held on December 15, 2025](#), the City Council asked the HHSAC to discuss whether the City should consider allowing long term occupancy of recreational vehicles and tiny homes in Single family neighborhoods at an upcoming meeting.

Councilmember Sherrell provided some information to the City Council at the December 15th Study Session on the City of Portland, Oregon's program that allows households to reside in Recreational Vehicles in Single Family neighborhoods. Councilor Sherrell has noted that Clackamas, Lane and Deschutes Counties have also adopted policies that allow households to reside in recreational vehicles in single family neighborhoods. Below is a link to the City of Portland program page, and to the City of Portland's definition of a Recreational Vehicle.

www.portland.gov/ppd/zoning-land-use/zoning-code-overview/occupied-rvs-and-tiny-houses-wheels

The Council Study Session memo also included the following considerations from City Staff: Occupied RVs on Single-Family Lots: Key Planning, Safety, and Fiscal Considerations

1. Land Use

- Temporary RV occupancy during an emergency housing crisis (e.g., COVID) can be authorized without long-term zoning implications.

Planning Department

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Memo

- Ashland already provides emergency shelter capacity through its car-camping allowance on commercial and church parking lots (with property-owner consent), offering a flexible temporary option without altering residential zoning.
- A permanent allowance for RVs as dwellings effectively adds a new residential unit and would require review of setbacks, density, driveway capacity, fire access, and spacing between structures, none of which occurs without a formal land-use or building-permit process.

2. Utilities & Infrastructure

- RVs are not designed for permanent water, sewer, or electrical connection; improvised hookups create safety and sanitation risks. Extension cords, hoses, and RV sewer fittings are not permitted for long-term residential use. Consideration of new (permanent) utility connections would need to be evaluated, permitted and inspected.
- A permanently occupied RV is functionally an additional dwelling, which would normally trigger system development charges (SDCs) based on the impacts of an additional household on City systems (water, sewer, parks, transportation)

3. Taxation

- Unlike ADUs or duplexes, an RV does not add taxable real-property value, resulting in an untaxed dwelling on the lot.
- Property taxes fund fire protection, police, schools, streets, parks, and emergency services. A household living full-time in an RV receives these services, but because the RV cannot be assessed as real property, no additional tax revenue is generated to support the increased demand.

4. Habitability & Substandard Housing

- RVs are built to RV standards, not residential building code, and lack required snow-load capacity, seismic resilience, insulation, ventilation, and moisture control for permanent housing.

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- Heavy reliance on propane for heating and cooking creates increased fire and explosion risk when used long-term. Further natural gas use for new dwellings in the City may have implications regarding the pollution impact fee passed by Council which goes into effect on January 1, 2026.
- Long-term RV occupancy typically results in substandard living conditions that do not meet minimum habitability requirements.

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