



November 14, 2018

Final Grant Report for Meyer Trust Housing Opportunities Award # 17040225

An updated Outcome and Reporting Chart

[Meyer Outcome and Reporting Chart](#)

A completed Demographic Informational Survey (complete and submit online at <https://www.surveymonkey.com/r/MeyerGranteeSurvey>)

Completed online 11/13/2018

Meyer Technical assistance grant did not specifically benefit any special group, since this grant paid for JKP Fundraising, LLC to do an audit and feasibility study and to better train Board Members to fundraise for a Capital Project.

Meyer's TA funding also paid for the Seder Architectural and Urban Design to provide pre-design concept drawings and evaluate zoning in our area for our Capital Project and provide cost estimates.

In the interest of Equity, NESS provides Rules of Engagement exemplifying the creation of Equity for all groups. Our Capital Project will provide housing and services to all of the most of the individuals mentioned in the survey.

An accounting of Meyer's grant expenditures to date compared with the approved budget

As per grant agreement, NESS paid the following:

JKP Fundraising	\$10,150.00
Seder Architectural	\$ 6,000.00
Total	\$16,150.00 (total grant amount)

Any materials that were produced with Meyer funds and are included in your grant deliverables. These files are linked at our website and also uploaded to Meyer

[JKP Fundraising LLC. Feasibility Study and Audit](#)

[JKP Fundraising, LLC. Board Training Handouts](#)

[Seder Architectural, LLC. Zoning Summary](#)

[Seder Architectural, LLC. Phasing and Cost Estimates](#)

[Seder Architectural, LLC. Concept Digital Drawings](#) (this is the link to the dropbox)

[NESS "living" Rules of Engagement](#)

[NESS Equity Statement](#)

Questions for final reports

1. Were the project goals achieved? If not, please explain.

Yes.

2. Describe the one most important way that the project contributed toward strengthening the housing sector by building capacity, diversity, equity and inclusion, and collaboration.

Clearly, the most important and enduring outcome of this Technical Assistance grant is that it brought together individual citizens and community agencies to work for the common goal and purpose of providing housing and services for our vulnerable population and as well as for those people who will care for them.

From within this gathering, came skills, talents, experience, loyalty, determination, and devotion to our nonprofit's mission and commitment to "Aging in Place" by providing necessary housing and long-term-care services.

We heard and noted the complexity of living with a disability in our community and vowed to address those needs. We listened to the signing of the deaf and came to a better view and understanding of the importance of using new technologies to inform and guide people who are hearing and vision impaired. Their description of an enabling entrance to our future buildings remain etched in our vision.

3. Did you encounter any unexpected opportunities or challenges with your project that impacted your ability to achieve the progress indicators and outcomes listed in your Outcome and Reporting Chart?

a. If yes, briefly describe the opportunities or challenges you experienced and how you responded to them.

We achieved the progress indicators of the Outcome and Reporting Chart. However, the unexpected opportunities and challenges increased the time and effort to do so. We finished this projected later than we expected to.

OPPORTUNITIES: Carolyn Fry, Director of DDI Service attend our information-gathering meetings. The resulting collaboration with **Lincoln County Health and Human Services** have expanded services to our North Lincoln County community. By staffing a mental health counselor at NESS twice a month and more often as needed, counseling is available for NESS Club participants, staff, and anyone in the community without having to commute 45 minutes to Newport.

Future Post Media, Richard and Myrl Wright, attended our meetings and stepped forward to "brand" NESS to the community with some remarkable videos. The first video was specifically about the need for housing and residential care in Lincoln City. Click here to see the video: [Our Place](#)

Early in the year, while NESS was in the midst of Meyer's TA project, the City of Lincoln City advertised a Request for Parties of Interest (RFPI) for purchasing and developing

five city-owned properties. We responded to the RFPI proposing to develop one of two, or both, of these properties. The City requested an interview with NESS for the proposal of the NE 25th Street acreage, which adjoins the motel property we wanted to purchase

As an introduction to our interview, we played Future Post Media's video, expressing our needs for residential care and workforce housing. JFP Consulting attended the interview to explain his intended feasibility/audit and fundraising training. Mark Seder attended showing pre-design concept posters of proposed residential-care homes, communal building, and affordable housing. Their involvement was not part of the TA grant proposal, yet both parties agreed to participate in this important opportunity.

Although the City did not accept our proposal for *that* property, the City did accept our suggestion to form a Public-Private Partnership and to developing another city-owned property for "Our Place." As next steps, the City asked NESS to do the following: (1) find and engage a willing developer to work with us and (2) to select another City-owned property for development.

Andrew Montgomery, TerraForma Architecture + Planning + Interiors, has agreed to work with us pro bono in preliminary stages while we secure funding, which later compensates him for his part in the project. He understands the process of attaining housing grants/funding and raising community dollars. He's an experienced builder on the Oregon Coast, is well thought of in City Planning and Development, and he proposed workforce housing solutions to the community in his RFPI.

CHALLENGES: Our rural community is always challenged when working with individuals and contractors who mainly work in Portland or other distant cities, as JFP and Seder do. Two of our board members live part-time in one in Hood River and the other in Seattle. While finding available expertise and staffing locally remains a challenge, we are finding ways around this barrier.

Recently, we started using Video Conference App "Teams", part of our donated Microsoft 360 Cloud presence. We are able to have video conference connecting up to 15 people. Slowly, we are training and practicing using this new app. In our recent Savvy Caregiver class, we were able to video conference with a couple on vacation, our nurse who was having knee surgery, and on one day, with an employee/trainee who was home with her ill daughter.

4. Have there been any significant changes in your organization that impacted your work on this project?

To the positive side, Future Post Media has impacted this project by video recording our programs and vision with the determination to make the community aware of the need NESS offers in serving our elders and disadvantaged population.

5. How will this project affect your organization and its work moving forward?

Having the Meyer's Technical Assistance funding and being able to tell other agencies and individuals about this project and how Meyer Memorial Trust supports NESS, has proved to be a marketing tool in itself. With that added attention to our organization, we

have been able to explain our vision and our needs as a community while enlarging our audience and donors.

James Phelps, JFP Fundraising, LLC., in his audit and feasibility study highlighted our deficiencies as an organization and as a Board of Directors. As Board Members reflected on his less than constructive delivery of criticisms, one person said his goal was to anger us, so our rage would send us forward with raw determination to raise the needed money. Another person said, his presentation is “simply text book.” He provided a list of what we might find in a chapter on “what not to do” as a nonprofit.

Nevertheless, our Board is left with James’ list and timeline of what needs to be done to “fundraise” for any project. Although his list specifies who is responsible for each “to do”, the Board will now decide, going forward, who is best qualified and willing for each task.

Although the architect Mark Seder was present at our “information gathering” meetings, failed to understand the magnitude of our desire to build “beyond ADA” using new and innovative design and technology. After the first meeting, he suggested we all go to Portland to see the assisted living facility his father lived it, even though we were requesting pre-design for a residential-care and skilled-nursing home, not for an assisted living facility. Despite, giving him examples of floor plans from the Green House Project®, and referring him to the newly constructed ADA-Accessible Veterans Home in Lebanon, Oregon, which is built on a similar care model, in his computer-generated concept drawings, Mark Seder, showcased an expansive open staircase in the residential-care home. Thus making our sensibilities more poignant.

Going forward, means learning to better articulate our wants and needs with the understanding that we are challenging the status quo. We must become perceptive and realized when our visions are being thwarted by convention. We must learn how to reject mediocrity as a means to creating a place of equity, designing and building a place where everyone can attain their highest potential.

What are your next steps?

- Post this Report and attachments on our web site Northenders.org
- Email Board Members, the Development Committee, Andrew Montgomery, and other interested individuals, directing them to the report and asking for feedback.
- Continue creating the potential donor list, in process
- Board action through email:
 - Email vote to accept Richard Wright’s application to Board
 - Create simple Instructions to ask for donations for this holiday season from friends and relatives. What’s it for? Housing?
 - Schedule next Board Meeting
 - with intent to clarify roles and responsibilities for Development (from James’ list)

- present proposal for Modular Construction as recommended by John McDaniel, Elder wise. <http://www.phncommercial.com/>
 - Clarify definitions of Working Board, Governing Board, and innovative Boards, and which are we going to be.
- Create and Post potential funding sources, grant procedures, and timelines
 - Select granters willing to fund a professional Grant Writer; apply
 - Select granters who may fund full-time Development Coordinator; apply.
 - Define and establish working relationship with City of Lincoln City
 - Share and Post at Board “Sharepoint” Site the current Business Plan to revise and to add new programs and supports.

Note: If your grant agreement notes a phone check-in in lieu of a report, program staff will schedule an informal phone check-in with you near the date indicated in the grant agreement. The staff contact will provide questions and any requests for supplemental materials in advance of the phone check-in.

Jody Marshall did a site visit and also two phone check-ins.

We are required to submit the above final report.

Respectfully submit,

Jan Molnar Fitzgerald, Exec Dir

