



Shelter and Transitional Housing

Feasibility Study

Submitted: March 18, 2024

Cover Sheet RFP 13-2024

Organization /Lead Applicant and Address:

EHI Consultants

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Title of Project:

Shelter and Transitional Housing Feasibility Study

Project Summary:

EHI and the Catholic Action Center proposes to design a program that addresses the issue of homelessness in Lexington, Kentucky. We have built a proposal around objectives, program design and work tasks.

Objectives:

1. Establish a transitional housing program specifically designed to assist homeless individuals in.
2. Provide stable housing to residents while addressing their underlying challenges and facilitating their reintegration into society.
3. Offer a range of social services aimed at addressing physical and mental health needs, employment assistance, life skills training, and educational opportunities.
4. Foster a supportive community environment that promotes accountability, empowerment, and long-term self-sufficiency.

Program Design:

1. **Housing Facilities:** Acquire or repurpose existing buildings to create safe and comfortable housing units.
2. **Social Services:** Collaborate with local service providers, including healthcare professionals, counselors, educators, and job training programs, to offer comprehensive support.
3. **Case Management:** Assign dedicated case managers to each resident to develop personalized plans for housing stability and goal achievement.
4. **Community Integration:** Facilitate connections with community resources.
5. **Security and Safety Measures:** Implement security protocols to ensure the safety of residents and staff.

Work Tasks and Deliverables:

1. Data Survey Design and Implementation
2. Diverse Representation
3. Community and Stakeholder Participation and Engagement
4. Final Report



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March 18, 2024

Dear Selection Committee,

EHI Consultants (EHI) is excited to present our proposal for the RFP 13-2024 Lexington- Fayette County Shelter & Transitional Housing Feasibility Study. We are a local planning firm based in Lexington, backed by a skilled team of professionals who are recognized both locally and nationally. Our expertise covers a wide spectrum, from comprehensive housing assessments, neighborhood planning and community revitalization to public engagement and transportation infrastructure.

To enhance our capabilities, we have teamed up with the Catholic Action Center a local non-profit homeless advocacy organization with a history of serving the homeless population since 2000. The Catholic Action Center is based on the Catholic Worker Movement, began by Dorothy Day. The center is a house of hospitality that welcomes all who are in need.

EHI and the CAC brings a local perspective and understanding of the issues around neighborhood sustainability, planning, housing, homeless and service providers as they relate to the requirements outlined in this feasibility study. Together, our team is equipped to meet your needs.

Since our establishment in 1995, we have specialized in housing studies, strategies, and plans for public sector clients. Our portfolio includes a comprehensive look at housing markets, effective financing strategies, assessments to inform policy decisions, and well-rounded, fiscally sound housing plans. Our approach is rooted in understanding the Lexington affordable and homeless market and the services needed for public benefit and the ability to leverage federal funding programs that address the housing needs of vulnerable households that the market might overlook. We explore different options and foster consensus for informed decision-making.

We are excited to work alongside the City Staff and community stakeholders to develop a successful feasibility study to meet the housing needs and implementation of a transitional shelter program.

Sincerely,
EHI Consultants

A handwritten signature in black ink, appearing to read 'Ed Holmes', written in a cursive style.

Ed Holmes, AICP
President



SECTION I

Experience, Qualifications & Organizational Capacity



Who we are



EHI Consultants, a multidisciplinary firm, is well prepared to lead this effort. Founded in 1995. For over 25 years, EHI has been at the forefront of bringing innovative and modern solutions to neighborhood housing planning and design efforts. We

are extremely knowledgeable of the city's neighborhoods and communities based on our past and current planning work. EHI has completed over 12 neighborhood and small area plans for Lexington alone. We have also completed similar types of plans and feasibility studies for communities in Lexington, Louisville and other cities in the region. Combined EHI has participated in and completed over 70 similar feasibility studies, planning and housing efforts that have resulted in plans and assessments that have been implemented and the projects being constructed.

EHI was selected in 2023 to conduct the Lexington Affordable Housing Needs Assessment project. Three of our signature projects include the planning and design efforts with the Lexington Community Land Trust - Davis Park Neighborhood redevelopment project, and the Post Clinic Feasibility Study in Mt. Sterling, KY. and the Paris, KY West Side Neighborhood - Westside Waste Transfer Station feasibility study.

We believe that this Fayette County Shelter and Transitional Housing Feasibility Study requires a team that has the capabilities to understand Lexington neighborhoods that are most impacted by homeless shelters and affordable housing issues. Our neighborhood plans always focus on the concerns and issues of affordability and the provision of affordable housing. These plans included a detailed analysis of social and economic housing data along with empirical survey data that forms the basis of recommendations on housing availability. Our skill sets of neighborhood planning, community-based surveys, stakeholder outreach, and engagement uniquely qualify us as a firm that is **knowledgeable** of Lexington's housing issues, we are **locally** based and understand the political, social, and economic concerns that impact housing and shelter needs. We know or **have interacted** with all of the neighbors, citizens, and stakeholders that have interest and concerns around this topic. Combining these attributes with our ability to conduct housing feasibility analysis enables EHI to 'hit the ground running' because we have done this several times before and are up to

the challenges that Lexington faces in addressing homeless and shelter concerns

EHI Consultants operates as a full-service planning and engineering consulting firm, serving public and private sectors. Our services includes, land use planning, housing and community development, environmental planning, civil and environmental engineering, stakeholder and community outreach efforts, and public facilitation.

We are designated as a Small Business Administration (SBA) HUBZone firm and Small and Disadvantaged Business. Our certifications include the State of Kentucky - Transportation Cabinet and Kentucky Minority Business Council. Notably, we received the Kentucky Pacesetter Business Award from the SBA in 2011 and the SBA District Office 8A Hall of Fame Business.

"It's not about our personal accolades or portfolio—we define success by how well we solved the problem and served the greater good of the community"

We Have Built a Foundation of Trust and Knowledge with LFUCG. EHI has fostered a strong foundation of trust and expertise with LFUCG and other communities, exemplified by some of our relevant housing projects such as:

- Lexington Affordable Housing Needs Analysis
- East End Small Area Plan
- Winburn Small Area Plan
- Lexington Housing Market Analysis
- Southend/Davis Park Urban Village Plan
- The Lexington Community Land Trust establishment
- Green Acres Small Area Plan
- Armstrong Mill Small Area Plan
- Cardinal Valley Small Area Plan
- Lexington Infill and Redevelopment Study
- Lexington Opportunity Zone Report
- Lexington Sustainable Growth Study
- Paris, Ky. Westside Neighborhood - Housing and Redevelopment Plan
- Hopkinsville, Ky. Inner City Revitalization Zone Housing Assessment

Our success lies in cultivating relationships with stakeholders, regulators, officials, and the community, reflecting our commitment to holistic service.

“ We Are Committed to the Local Community”

EHI’s commitment to the local community is unwavering and deeply rooted in its thorough understanding of Lexington and the roles of planning, housing, growth, and housing issues that are interrelated. EHI as part of our planning process engages in diverse community initiatives, EHI actively participates in public outreach forums, such as Lexington “on the table,” and neighborhood events in the Georgetown, East End, and Davis Park communities.

EHI has developed into one of the region’s premier planning, engineering, and stakeholder engagement firms. Past performance assessment reports that we received from our federal agencies indicated the level and quality of our work performance. We have never received anything less than “very good or exceptional” reviews over the past 20 years. EHI takes pride in our performance and assessment reviews and strives to work closely with project managers to ensure that we are meeting the intent of the project’s scope of work. We make every effort to establish at minimum monthly progress meetings, reporting mechanisms, and problem-solving strategies when an issue arises, while yet meeting our planned timelines.

Catholic Action Center

EHI strategically has selected a partner that understands the homeless issues and housing access for those individuals that need shelter. Divine Providence Inc. (Catholic Action Center under the auspices of Central Kentucky Housing and Homeless Initiative) CKHHI) provides a community of hospitality, safety, and acceptance to those looking for a path from the streets to a home, giving an opportunity for the community to reach out to those who are disenfranchised, voiceless and left out of social service systems, and needing to experience the acceptance, accountability and love of a community while receiving the basic needs of food, shelter and connection to services.

Since June 2000, in Lexington, KY, the Catholic Action Center is based on the Catholic Worker Movement, began by Dorothy



Day. The center is a house of hospitality that welcomes all who are in need. It is a faith-based outreach of volunteers who strive to provide all guests with a welcoming place to receive their basic needs with dignity. The mission of the center is to “fill in the gap” of services for our brothers and sisters in need with no government funding by providing an opportunity for people of faith to connect with and serve the marginalized of our community. Three meals a day, shower and restroom facilities, mail receipt, a telephone, clean clothing and a place to gather are all a part of the hospitality offered. Caring ears to listen and connections with social service agencies are also available. Daily prayer services are held for those who hunger spiritually.

CAC Services Provided:

“Over 9.5 million meals served. Over 1.7 million nights of shelter were provided. Over 2.5 million items of clothing were given. Over 225,000 showers were taken. Over 95,000 loads of laundry cleaned. Over 111 funerals for souls who had no one. Millions of prayers raised to the heavens. Unlimited offerings of dignity, compassion, forgiveness, mercy by over 200,000 volunteers - no government funding no paid staff.”



Compassionate Caravan

Winter can be a deadly time for those who experience homelessness. Some choose to remain outdoors and “camp”, some don’t know how to find a shelter or are fearful they will be

turned away. The Compassionate Caravan is a volunteer effort that delivers cold weather supplies and offers rides to shelters to the unsheltered when the weather is life-threatening. Together we as a community can be sure that no one freezes in Lexington, Kentucky because they are experiencing homelessness. Also, the summer heat can be deadly, and the Caravan delivers heat relief supplies on weekends when other services are not available



Street Voice Council

History of the Street Voice Council



Founded in 2009 in Lexington, Ky the Street Voice Council meets the 1st Thursday of each month for those experiencing homelessness to gather for fellowship, a meal and discussion.

The Catholic Action Center sponsors the gatherings to give our sisters and brothers a place to have a voice and participate in community activities. These gatherings allow the SVC members to listen and be heard as members of our community.

SVC members have participated in the 4th of July parades, the St. Patrick's Day parade, sponsored an Arts and Music Festival, tabled voter registration drives, participated as official partners with the Census Bureau in the 2010 Census and co-sponsored the 2023 Street Survey Count. SVC was co-sponsor and developer of the 2024 KY Citizen Survey on Criminalization of Homelessness.

To contact the Street Voice Council:

Email caclex2000@gmail.com

Follow on Facebook: Street Voice Council

Dignity Station



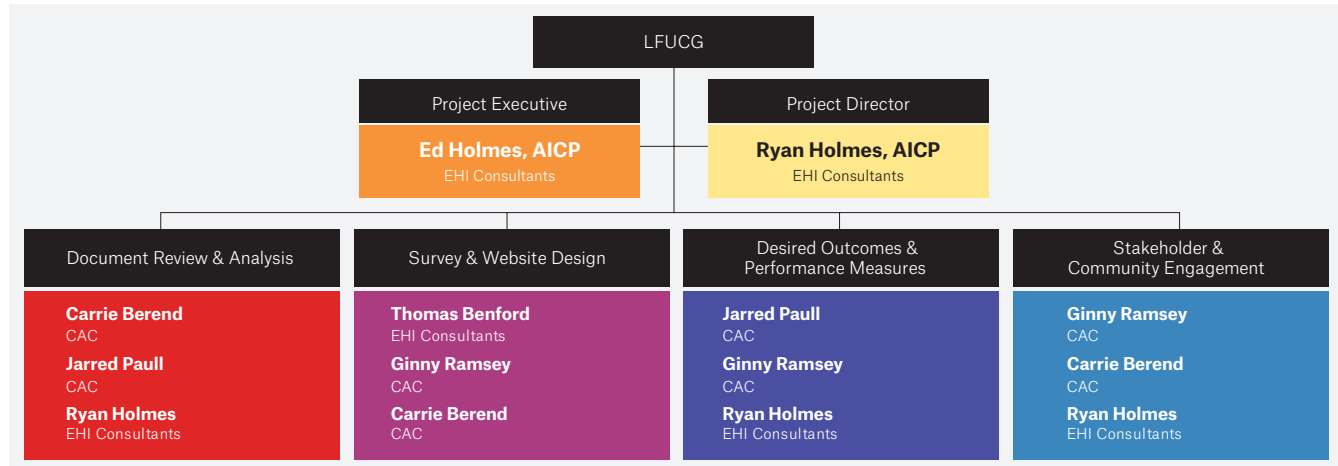
The Dignity Station is a mobile shower/laundry outreach for those who are unhoused in our community. The Dignity Station will meet folks where they are and give them the opportunity to receive information on services and an opportunity to build relationships with Radical Connectors and social service providers who will help them on the path from the streets to a home. For more information or to volunteer, email

caclex2000@gmail.com



Our Team

Our team is led by locally based professionals in planning and development and homeless advocacy. We are knowledgeable in local, state and national homeless and housing initiatives and best practices. Our team includes the most qualified planners and, data analysts, researchers, housing analysts, and homeless advocates who also have the staffing capacity, resources and knowledge to meet all of the requirements identified in the rfp within your quality and schedule of commitments.



Key Personnel

Ed Holmes, AICP EHI (Project Executive)

Founder and President of EHI, Ed is a certified planner with over 40 years of experience focusing on incorporating sustainable planning strategies into housing development redevelopment, master planning, environmental justice, and land use plans. Mr. Holmes has extensive public and private experience in affordable housing, land use, and comprehensive planning, first serving as a land use planner and then as Director of Planning for the Bluegrass Area Development Districts (BGADD) Division of Planning. He has been involved with affordable housing development and planning in Lexington for years. He advised and assisted the Urban League of Fayette County in the creation of its non-profit Fayette County Local Development Corporation, was the lead designer of the Southend / Davis Park Neighborhood and was instrumental in the creation of the Lexington Community Land Trust (CLT), which he is now assisting the CLT in managing its 76-unit tax credit affordable housing project and other affordable housing CLT led initiatives. Ed is the project executive leading planning efforts for the Lexington Affordable Housing Needs Assessment. Ed is a former member of the Lexington Planning

Commission, former chair of the Lexington Urban League and currently serves on the board of the Lexington Civic Center.

Ryan Holmes, AICP EHI (Project Manager)

Ryan possesses more than 15 years of expertise in land use and regulatory planning. His professional focus lies in master planning, sustainable design, and greenfield redevelopment strategies, with a strong emphasis on housing and community revitalization, enhancing quality of life, and fostering economic development. He is particularly skilled in the transformation of complex challenges into communicable and achievable strategies and outcomes, in addition to strategies for alignment of priorities to investment, land use plans, investment options, and innovative partnerships. He is currently guiding planning efforts for the Lexington Affordable Housing Needs Assessment.

Throughout his career, he has authored numerous comprehensive plans, housing studies, subdivision regulations, zoning ordinances, and other planning and engagement, Paris Bourbon County Comprehensive Plan housing, and demographic analysis.

Adam Klier - EHI Senior Planner

Adam brings a strong understanding of housing, planning, and land use experience to projects as a planner for EHI. He has worked on a variety of planning and housing-related projects in Louisville, Lexington, and the region, addressing issues around regulations, land use, and housing strategies. His tasks will be to coordinate the housing research and methodology analysis with community stakeholders and assist in determining affordable housing needs, funding strategies, and interface with TPMA. His most recent and relevant projects include the Town Branch Park and Cardinal Run Park stakeholder outreach Adam specializes in housing research and strategy, workforce development, and community resiliency. Data-driven and goal-oriented, his approach is one of locating gaps and developing solutions.

Thomas Benford - EHI Planning Research Assistant

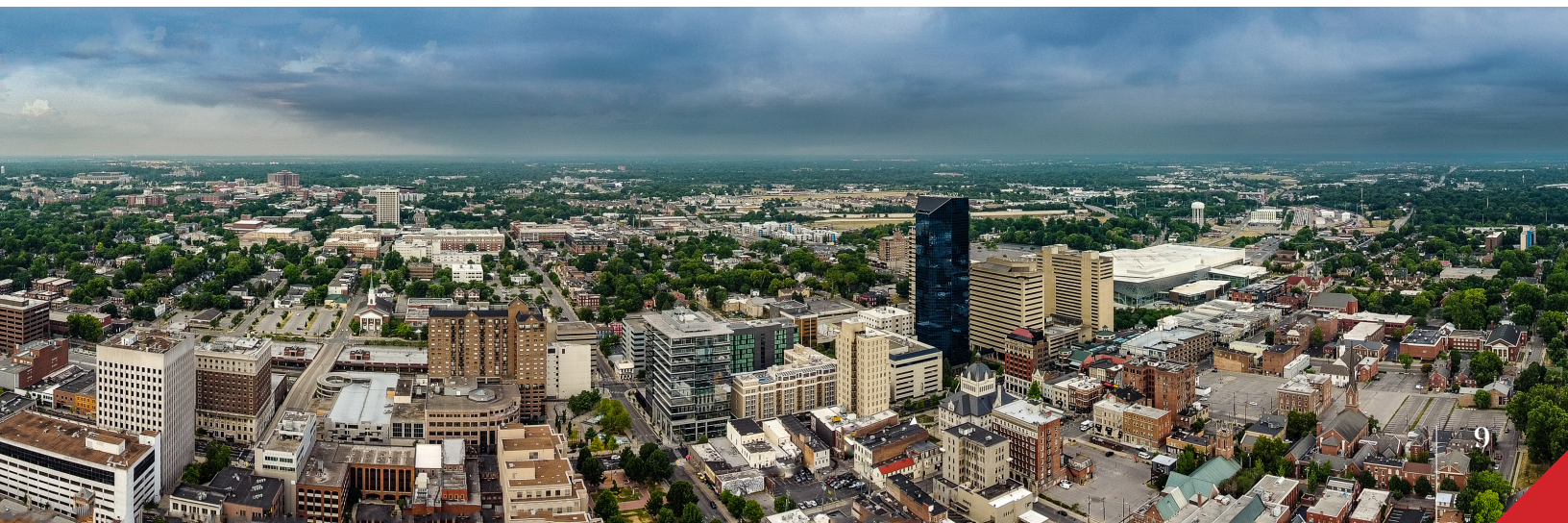
Thomas has more than 15 years of experience with the ability to gather and assemble data and prepare an analysis. Thomas is proficient in all aspects of census, survey deployment, and ESRI software data gathering. He is experienced and proficient in economic and demographic data gathering and analysis. He is currently gathering similar types of demographic data for projects in Louisville and Lexington, (Davis Park Housing, Louisville District 21 Neighborhood). Thomas also assisted in the planning data gathering and analysis for the housing assessment components for the Winburn, Armstrong Mill Rd., and Cardinal Valley Small Area Plans in Lexington. Thomas will be leading the efforts in demographic data gathering and analysis of both housing and economics. Thomas has a degree in communications. Thomas has been with EHI for 14 years.

Carrie Berend -CAC

Carrie Berend has had the privilege of 10+ years of experience working with neighbors experiencing homelessness. She has a degree in Religious Studies from St. Edward's University in Austin TX, and has worked with community organizations in Kentucky, Oregon and Texas including JOIN and Catholic Action Center. Her experience includes working at day centers and night shelters, supervising family and veteran transitional housing, leading homeless immersions, coordinating volunteers and assisting with mentoring and awareness events that purposefully pair individuals with different lived experiences to foster community and connection. During the pandemic, she coordinated a program working with volunteers, eviction court observers, landlords and tenants to help families remain in their housing. She has been involved in a range of projects working alongside those experiencing homelessness including the awareness play Please Don't Call Me Homeless, I Don't Call You Homed, the From the Streets to a Home supportive housing program, Circle of Care mentoring program, See Me, Hear Me, Know Me conversations, and the Give Kids a Home program and Connector Teams for family housing support. As a member of the Central KY Housing and Homeless Initiative, she helped coordinate the 2023 Street Survey.

Jarred Paull- CAC

Jarred Paull is a Commercial Banker with 20 years of experience assisting clients with their financial goals. Mr. Paull focuses on complex transactions primarily with a real estate component, and within that realm, nonprofit finance as one area of expertise. He is a board member of the Bob Brown House focusing on housing individuals with special needs and is the Vice Chair of the Central Kentucky Housing and Homeless Initiative focusing on social issues for individuals who are homeless or housing insecure.





SECTION II

Project Design & Operation

Develop

Understanding Project Scope and Objectives

To thoroughly understand the project's scope and objectives, as outlined in Section 5.2 PROJECT DESIGN of the RFP, our team will conduct extensive meetings with relevant and appropriate LFUCG agencies, departments, community leaders, local businesses, and other key housing and homeless stakeholders. Our team will actively listen and engage with these stakeholders to gain insights into their concerns and issues around transitional shelter housing. The benefit of selecting our team include:

1. Knowledge of the Lexington area: Collectively, our team has experience navigating the complexities and perceptions of homelessness and housing problems, with over 60 years of combined dedicated involvement in local projects and initiatives. We possess in-depth insights into the socioeconomic landscape, political nuances, and cultural dynamics that shape the community identity. Through our deep understanding of local government structures, regulatory frameworks, and community dynamics, we are well-equipped to navigate the intricacies of shelter, transitional housing and homeless issues.

2. Past and current projects within the city: Over the past 25 years, we have undertaken a multitude of projects spanning various sectors within and for LFUCG. From infrastructure development, parks, housing, homeless advocacy, social services, to economic and neighborhood revitalization initiatives, our teams portfolio reflects our commitment to advancing the communities prosperity, health and well-being. Our track record includes successful collaborations with municipalities, non-profit organizations, social service providers, educational institutions, and private enterprises, each project contributing to the city's growth and development. EHI is currently leading the efforts with the city in developing its Affordable Housing Needs Assessment, gathering valuable insight, data and a greater understanding of the homeless and housing issues.

3. Knowledge and working collaboration and relationships within the region: Our team has cultivated meaningful relationships with a diverse array of stakeholders on several LFUCG projects and social services providers. We prioritize collaboration and engagement with neighborhoods, social service providers, businesses, civic organizations, and government agencies to ensure that our projects are rooted in community needs and aspirations. Through open dialogue,

mutual respect, and transparent communication, we have built a network of trusted partners who share our vision for equitable, fair and socially aware initiatives.

4. Knowledge of stakeholders: We have developed deep insights into the unique challenges, opportunities, and priorities of each stakeholder group, enabling us to foster collaborations and address complex issues collaboratively. By actively engaging with stakeholders, we facilitate meaningful dialogue, build consensus, and drive collective action towards shared goals.

5. Access to data and analysis capabilities: Leveraging cutting-edge technology and advanced analytical tools, we have established robust data collection, management, and analysis capabilities. Our access to comprehensive datasets, including GIS mapping, demographic trends, economic indicators, and policy frameworks, empowers us to conduct thorough assessments and derive actionable insights. By employing sophisticated modeling techniques and statistical analyses, we uncover trends, patterns, assess potential impacts, and inform evidence-based decision-making processes.

A key to our approach is grounded in successful community-based land use / comprehensive planning and development strategies combined with a broad-based social advocacy and social services approach, to address the design and provision of shelter and homeless transition housing . We are unique in having the ability prioritize and understand the intricate physical relationships between demographics, economics, and land use with the provision of social services and advocacy, all of which that are critical in guiding decision-making processes for public and private sector investments. Our team excels in navigating project development dilemmas and fostering "win-win" outcomes that align the desires of the private sector with the capabilities of the public sector.

Our project team will work closely with the Office of Homelessness Prevention & Intervention and the Housing Advocacy & Community Development to map out whom LFUCG needs to reach and hear, keeping in mind that the "usual suspects" who have a presence in local decision-making do not represent the full set of community voices. Intentional efforts will be made to identify stakeholder groups that have been underrepresented in decision-making processes in the past.

We will prepare an exhaustive and comprehensive stakeholder list that will be inclusive of all, ensuring diverse representation within the community for their input. The project team will:

- Identify a diverse group of stakeholders who are most affected by homelessness and service providers, and other issues at stake, considering specific neighborhoods as well as design and location standards and guidelines.
- Identify those community organizations, groups, service providers, faith institutions, employment and workforce and others.
- Recognize and engage other stakeholders (housing and non-housing practitioners, industry representatives, advocates, and other governmental agencies) that bring important perspectives, concerns, and expertise to the feasibility study process.

PROJECT DESIGN

The following project design details the level of effort and approach we will undertake as part of the feasibility study process.

Introduction:

The issue of homelessness is a pressing concern in Lexington, Kentucky, requiring immediate attention and sustainable solutions. This proposal aims to establish a transitional housing program equipped with comprehensive social services to address the multifaceted needs of individuals experiencing homelessness in our community.

Overview of the Problem:

In order to design a plan to address homeless housing, we must first understand the complexities around the issue. Lexington, like many cities across the nation, faces a homelessness crisis. Factors such as lack of affordable housing, unemployment, mental health issues, and substance abuse contribute to this problem. Existing shelters often provide temporary relief but fall short in offering holistic support to facilitate individuals' transition out of homelessness.

Objectives:

1. Establish a transitional housing program specifically designed to assist homeless individuals in Lexington.

2. Provide stable housing to residents while addressing their underlying challenges and facilitating their reintegration into society.
3. Offer a range of social services aimed at addressing physical and mental health needs, employment assistance, life skills training, and educational opportunities.
4. Foster a supportive community environment that promotes accountability, empowerment, and long-term self-sufficiency.

Program Design:

1. **Housing Facilities:** Acquire or repurpose existing buildings to create safe and comfortable housing units equipped with essential amenities.
2. **Social Services:** Collaborate with local service providers, including healthcare professionals, counselors, educators, and job training programs, to offer comprehensive support tailored to residents' individual needs.
3. **Case Management:** Assign dedicated case managers to each resident to develop personalized plans for housing stability and goal achievement.
4. **Community Integration:** Facilitate connections with community resources, encourage participation in recreational activities, and promote volunteer opportunities to foster a sense of belonging and purpose.
5. **Security and Safety Measures:** Implement security protocols to ensure the safety of residents and staff, with a zero-tolerance policy for violence, substance abuse, or other disruptive behaviors.

Partnerships:

1. Forge partnerships with local government agencies, nonprofit organizations, businesses, and educational institutions to leverage resources and expertise in addressing homelessness.
2. Collaborate with faith-based organizations and community volunteers to provide additional support and resources.

Funding and Sustainability:

1. Seek funding through a combination of government grants, private donations, corporate sponsorships, and community fundraising initiatives.
2. Develop a sustainable funding model that accounts for operating expenses, maintenance costs, and staff salaries.
3. Explore opportunities for revenue generation through social enterprises, such as on-site vocational training programs or community-based businesses.

Evaluation and Monitoring:

1. Establish measurable outcomes and performance indicators to assess the effectiveness of the transitional housing program.
2. Conduct regular evaluations to monitor progress, identify areas for improvement, and ensure accountability to stakeholders.
3. Solicit feedback from residents, staff, and community partners to continuously refine and enhance program services.

Conclusion:

The establishment of homeless transitional housing with comprehensive social services including the faith community in Lexington represents a critical step towards addressing homelessness and promoting social inclusion and economic stability in our community. By providing individuals with the support, they need to rebuild their lives, we can create a more equitable and compassionate society for all.

TASK 1 – Data:

Our approach will consist of an analysis that is both qualitative and quantitative data. Our team of social advocates through CAC and EHI planners will look in detail at both the qualitative social data and the quantitative physical demographic and land use data. Through the development of a focused designed survey, we will be able to measure empirical, measurable outcomes to arrive at a set of recommendations and conclusions using quantitative research of data to inform and guide our method of discovery. The Catholic Action Center will be leading our survey of the homeless population.

Quantitative

Our quantitative research will be the systematic examination of the need for supportive and transitional housing social services that are currently be used, such as job training, life skills training, alcohol and substance use disorder treatment, community support services such as childcare and educational programs.) This survey led level of Quantitative research will also provide the team and LFUCG “generalizable” findings,” using structured data collection identifying housing needs, funding and services currently offered.

Qualitative

In addition to quantitative research, we will also conduct

qualitative research employing data from several of the social services and stakeholder interview metrics that will be contrasted with the quantitative data research and analysis such:

- Insider or client population driven – (homeless population and service providers)
- Person-centered rather than purely data -centered
- An all-inclusive rather than relying on data and census driven analysis
- Depth of the issues rather than the breadth of all the issues centered around the need and provision of supportive and transitional housing

Our qualitative analysis will consist of and guide the analysis of data such as text data from surveys and interviews, conversations, and observations. While our quantitative data analysis will be census, LexCounts, HUD reports, and HMIS statistics driven. This analysis will be heavily dependent on our team’s analysis and a combination of other skills and personal knowledge of the social context of housing and homelessness.

The emphasis for this analysis and distinction of qualitative analysis is ‘sense making’ or understanding the issues and crisis before us. EHI has found based on past projects that “a creative and investigative mindset” is needed for a successful qualitative analysis, with the support and leadership from the Catholic Action Center and its supporters, an ethically enlightened and participant-in-context attitude, will lead us to a set of analytic strategies. And recommendations.

Data Coding

EHI and the project team will employ three data coding techniques for gathering and analyzing data relevant to supportive and transitional housing for this feasibility study.

1. Open coding will be used to identify concepts or key ideas around supportive and transitional housing strategies. We will examine the raw textual or census-based data line by line to identify trends, incidents, ideas, actions, perceptions, and interactions of relevance that will be useful and coded as “transitional housing concepts.”

Each of our housing-based concepts will be linked to specific portions of the data findings for validation. Some of housing concepts may be simple, clear, and unambiguous, while others may be complex, more difficult to implement and may be viewed differently by some of the stakeholders and participants

Once a basic set of concepts are identified, we will refine these concepts which can then be used to guide the remainder of the data, while simultaneously looking for new concepts and refining old concepts. These concepts will be driven by:

- Transitional housing costs vs services provided cost
- Coupling permanent housing with supportive services
- Collaborative initiatives to help end chronic homelessness
- New emerging groups of homeless

2. Axial coding, is derived once the categories and subcategories of the data is obtained, it will be assembled into a set of homeless type of housing needs relationships that will be performed simultaneously with open coding concepts. As conditions, actions/interactions, and consequences are identified, a pattern for program design will start to emerge, and we can then start explaining why the need for transitional housing exists, under what parameters is the project needed, and with what the consequences may be.

3. Selective coding, will be used to identify a central housing type category or a core housing variable that will be desired, that will systematically and logically relate this transitional housing type and design to the various homeless population needs, broken down by:

- shelter beds
- families with children's
- couple with minor children
- households with pets
- seniors
- people with accessibility needs
- persons with substance use
- mental health disorders
- members of the LGBT population
- others as determined from stakeholder and homeless population interviews

4. Finally, our standard software programs will be used to automate the data coding that will organize quickly and efficiently, search, sort, and process the data we will obtain into text and graphic formats for the various user-defined roles.

Task 2 - Process for Diverse Representation

Integral to our strategy is the seamless integration of outreach efforts with established organizations that serve and advocate for the homeless. By forging strategic partnerships, we amplify our campaign's reach and effectiveness, ensuring that our message resonates across diverse segments of the population.

We recognize and understand that when working with a marginalized group of individuals it is substantially different than the process of general community representation and can be extremely complicated and sometimes even frustrating. Our team possess the ability engage with members of the homeless and service provider community, from the very beginning of this project and will remain in communication during and after the study, which helps create long lasting relationships for the future development phase.

Our diverse representation will consist of just two steps:

- 1.** We know the different sectors of the community and has the ability to engage them
- 2.** We will identify and list key potential members within each identified sector.

Our past experiences and knowledge provides our team the ability to engage through positive relationships with diverse communities which is essential to ensure that the diverse community feel comfortable giving feedback in consultations and discussions. Through our past project experiences and efforts, we have been successful in developing a level of trust in engagement, outreach and diverse participation.

Our proven process consists of:

- 1.** Developing a plan to spend a significant amount of time in the engagement process-, prepare consult and report
- 2.** Understanding the nature of the diverse group
- 3.** Identify and seek out all individuals and groups that may have an opinion on homeless shelter and transitional housing
- 4.** Our team possesses the ability to be patient and creative with diverse groups, which is a strength and value that our team brings to this project
- 5.** Identify diverse groups, which will include a diversity of opinions and attitudes that will be inclusive in this process
- 6.** Our process will strive to make everyone feel safe, comfortable and their opinion matters, will lead to a range of diverse representation and outcomes.

Task 3 - Community Participation

Website

We propose as part of the outreach and engagement effort, to set up a project-specific website, using a vanity URL (Lexington transitionalhousing.org or something memorable). The website

is then used as a primary communication portal both out to the community as well as hosting project information and collecting input. We will employ a mix of traditional and digital outreach methods. Stakeholder forums and one on one interviews that will provide a platform for open discussions and brainstorming sessions around the issues of shelter and transitional housing. We will conduct online surveys accessible to a narrowly tailored group of stakeholders (homeless, service providers and housing design professionals) to ensure broad participation.

We would drive all communication to and through the website, giving our team ready and real-time access.

EHI also recognizes that web-based tools can be a helpful supplemental strategy to get information out into the community and to receive community input. That said, we have found that the implementation of web-based tools should also be informed by community members' access to relevant technology and reliable internet access.

We will provide access to information, surveys, and data to those groups that have limited access to the Internet through distribution outlets and relevant agencies for information through the utilization of newspapers, newsletters, television, and public information forums. Our survey outreach efforts has been proven to be highly successful, (e.g. the Affordable Housing Needs Analysis survey efforts have resulted in over 1300 responses in less than 2 months).

Stakeholder Engagement

We will create a comprehensive stakeholder engagement plan that includes targeted interviews with the homeless population utilizing outreach networks led by Catholic Action Center, Hope Center, Salvation Army and other relevant provider groups. By involving representatives from diverse backgrounds and interests, we will ensure that the project's objectives reflect the collective information and the quantitative and qualitative data obtained.

We are positioned to leverage our extensive expertise in community engagement to create a dynamic in person and virtual social media outreach campaign, designed to be sensitive to and understand the homeless and transitional housing issues of Lexington. Our approach aims not only to inform and engage individuals directly impacted by homelessness but also to foster meaningful connections with community housing advocates, potential service providers, and key stakeholders.

Integral to our strategy is the seamless integration of outreach efforts with established organizations that serve and advocate for the homeless. By forging strategic partnerships, our engagement's reach and effectiveness will ensure that our message resonates across diverse segments of the population.

Drawing upon our proven track record of successful engagement with various communities, EHI will tailor creative and informative content for dissemination across platforms such as Facebook, Instagram, YouTube, and other relevant social media channels. Additionally, our experience in conducting online surveys, exemplified by past initiatives including the Paris, KY - West Side Neighborhood Survey, Douglass Park Pool Survey, and LFUCG Mobile Market Survey, underscores our capability to gather valuable insights and feedback from a variety of targeted audiences.

In summary, EHI's approach to social media utilization represents a strategic blend of innovation, inclusivity, and proven methodologies, all geared toward fostering meaningful change in addressing homelessness within the Lexington community.

Stakeholder Outreach

Our stakeholder engagement approach will consist of strategies that go beyond the traditional efforts of outreach and engagement. It will be a comprehensive approach consisting of, social and physical qualitative and quantitative data, design based as well as financing, construction costs and operational considerations of management and maintenance of transitional housing:

1. EHI through its efforts working on the Affordable Housing Needs Analysis, has been able to survey with the assistance of the Catholic Action Center, has successfully surveyed over 100 homeless persons. The information from those surveys will form the basis of our homeless analysis that will help define the scope and breadth of the feasibility study. We will continue the survey efforts under this task and conduct one-on-one detailed and focused interviews with the targeted homeless population to enhance the data we currently have. We will utilize the agencies identified earlier as the primary sources to reach the homeless population as well as the January 2024 PIT (LexCount).
2. Survey and meet with a team of local architects, affordable housing design builders and other creative and innovative housing experts, who can assist in determining the types of affordable housing units that can be designed as transition housing for the homeless. This outreach effort will engage

the design community to provide tangible housing concepts and or ideas based on, need, housing types, accessibility to services, families, individuals, construction cost, appropriate density, as well as development and regulatory requirements of zoning and siting.

3. Coordinate with planning and planning staff a discussion about site location, density, zoning and design.
4. Identification and site assessment of potential sites for transitional housing development, with a set of location and site design principles for development.
5. Survey an interview relevant service provider, one-on-one to coordinate closely with the Office of Homelessness Prevention & Intervention, Housing Advocacy & Community Development, Hope Center, Lexington Rescue Mission, Salvation Army, Catholic Action Center.
6. A discussion with other groups, employment and workforce, neighborhood associations
7. Develop a public awareness outreach and education plan on transitional housing and community shelter. Define the issue as a multi-agency and communitywide effort.
8. Review best practices and what other communities have done successfully around this issue looking at innovative design and construction standards
9. Identify financing mechanisms (public and private)
10. Develop long term management and maintenance strategies

Our approach is to create many entry points for public and stakeholder engagement while recognizing the relative levels of power, and voices within each stakeholder group that we work with. This method of outreach provides an opportunity to informally interact with the public, provide information about the project, and gather input. We believe that there are six core principles of equitable engagement and will use these principles

to establish a planning framework:

1. Focus outreach on the best interests of the community
2. Engagement should be open, honest, and meaningful
3. Approaches should be inclusive and context-sensitive, respecting and having an awareness of those experiencing homelessness, developers, and others.
4. Information should be presented in a timely and relevant manner
5. Present accurate information that is easy to understand and accessible
6. Ensure the decision-making process is transparent

EHI has successfully utilized these principles in several recent projects in Lexington and the region these include:

- The Lexington Affordable Housing Needs Analysis
- The Lexington Sustainable Growth Study, which involved several of the stakeholders that would be relevant to this study.
- The Lexington Housing Market Study- a data-driven study on the future demands for housing in Lexington – Fayette County.
- The Post Clinic Feasibility Study (this was a study for a free health clinic in Mt. Sterling, KY that resulted in the construction of a new free health clinic.
- Paris Bourbon County West Side Transfer Station Feasibility Study (this study resulted in the site location in removal of a waste transfer station from a low-income minority neighborhood to a more preferable site in Bourbon County).

In consultation with LFUCG staff and others, we will develop a comprehensive schedule for a series of diverse stakeholders and community outreach and engagement meetings - grouped by their level of interest and involvement.





SECTION III

Desired Outcomes & Performance Measures

Task Deliverables:

Our project team will review the analyzed data, survey results and analysis, shelter and transitional housing stakeholder comments to produce a set of outcomes and performance measurements that address the suggested desired outcomes.

This final document will address in a detailed report the findings and recommendations from the data gathering, research and analysis. Consisting of:

1. Executive Summary
2. Findings and Recommendations identifying.
 - i. True capacity of Lexington's current shelter system
 - a. Providing an analysis of how many units or shelter beds are available broken down by special populations
3. Number of units or shelter beds are needed
 - a. broken down by special populations
 - b. families with children's
 - c. couples with minor children
 - d. households with pets
 - e. seniors
 - f. people with accessibility needs
 - g. persons with substance use the disorder and or mental health disorder
 - h. members of the LGBT population and others
4. Types of beds
 - a. How many are needed
 - b. Shelter or transitional housing for all sub population
5. Concept Design Element detailing innovative shelter housing types. What type of units will be needed by size number of bedrooms, tenure, seniors, people with disabilities, substance abuse, and others.
6. Best Practices and what other communities have done successfully around this issue incorporating innovative design and construction standards
7. Financing mechanisms (public and private) and what ways are the LFUCG's affordable housing funds being utilized most effectively, with recommendations on the utilization of the funds
8. Management and Maintenance strategies, startup and annual operation of any recommended additional beds or models.
9. Site suggestions on new shelter(s) in proximity and accessible to services
10. Types of Units needed by size number of bedrooms, tenure, seniors, people with disabilities, substance abuse, and others. with cost estimates for construction
11. Existing Organizations recommended operating a new shelter and or transitional housing with innovative and creative service delivery models may help the city achieve its goals.
12. Conclusion





SECTION IV

Proposed Project Schedule Milestones and Deliverables

SUN	MON	TUE	WED	THU	FRI	SAT
21	20	19	18	17	16	15
14	13	12	11	10	9	8
7	6	5	4	3	2	1
30	29	28	27	26	25	24
17	16	15	14	13	12	11
10	9	8	7	6	5	4
3	2	1	31	30	29	28

31
DECEMBER 2017

Milestones and Deliverables

The proposed timeline is based on the proposed 7-month period of performance beginning May 1, 2024, with an anticipated end date of November 30, 2024. This will allow the team enough time to thoroughly conduct the data gathering, survey analysis, develop a diverse plan for representation, a robust and focused community stakeholder engagement outreach effort, and a detailed final report with recommendations and findings. This schedule includes

a chronological list of tasks that incorporates the action steps detailed under each task in the proposal during implementation of the plan. The project schedule identifies the start and finish dates by task and the responsible parties/team member.

The process will conclude with a public presentation of the plan and finalization of a complete final document from the components described above.

Shelter & Transitional Housing - Project Schedule										Responsible Parties	
Project Tasks	May 2024	June 2024	July 2024	August 2024	Sept. 2024	Oct. 2024	Nov. 2024			EHI	CA
TASK 1 Gather & Review Documents, Data & Survey Design	May 1		July 1							●	●
TASK 2 Process for Diverse Representation	May 30	June 30								●	●
TASK 3 Community Stakeholder Participation Survey & Analysis			July 1		Sept 30					●	●
TASK 3.1 Website	May 15	June 30								●	●
TASK 3.2 Stakeholder Engagement Meetings			July 1		Sept 30					●	●
TASK 3.3 Community/ Stakeholder Participation			July 1		Sept 30					●	●
TASK 4 Final Report Council Presentation						Oct 1	Nov 15			●	●
LFUCG Monthly	Progress Meetings will be Scheduled Monthly									●	●
Progress Meetings as needed	●	●	●	●	●	●	●	●	●		

A person's hands are shown writing in a notebook with a pen. In the background, a calculator and various financial charts, including a bar chart and a pie chart, are visible on a desk. The scene is dimly lit, suggesting an office or study environment.

SECTION V

Proposed Line-Item Budget and Budget Narrative

The following budget

The EHI Team proposes to undertake the defined work plan for a fixed fee budget of \$195,000. An allowance of \$5,000 in expenses brings the total fee and expense budget to \$200,000. A breakdown of fees by task and by firm is provided below.

	EHI	CAC	FEE
TASK			
TASK 1	\$17,000	\$17,000	
TASK 2	\$15,500	\$15,500	
TASK 3	\$40,000	\$40,000	
TASK 4	\$25,000	\$25,000	
Total Fees - All tasks	\$97,500	\$97,500	\$195,000
Total Expense Allowance			\$5,000
Software data Purchase	\$3,000		
Miscellaneous	\$2,000		

We propose a fixed fee budget with monthly invoices based on the percentage of the project completed each month. EHI bills expenses at cost with no markup. All funds obligated to the Catholic Action Center will flow through the Central Kentucky Housing and Homeless Initiative CKHHI. Our team endeavors to provide LFUCG with the highest quality of services within their budget. The proposed budget and work plan will address the full breadth of shelter and transitional housing issues impacting homelessness in Lexington Fayette County. With an overall goal of developing a feasibility study that identifies and recommends strategies for housing that will accommodate a wide range of housing types for a diverse homeless population. We are happy to discuss changes to our scope, and accordingly to the project budget, which focus more narrowly on affordability and homelessness reduction for the lowest income and special needs households.

Total Costs were based on the following pricing structure:	
Key Personnel	Time Allocated to Project
Ed Holmes (EHI)	30%
Ryan Holmes (EHI)	30%
Adan Klier (EHI)	25%
Thomas Benford (EHI)	25%
Ginny Ramsey (CAC)	30%
Carrie Berend (CAC)	40%
Jarred Paull (CAC)	20%

Our hourly fee for this project is based on an average blended rate for the personnel assigned to the project reflecting our indirect rate that is applied to the staff hourly rate. The overall indirect rate includes the following:

Fringe Benefits- include group insurance (health, dental, life, etc.), disability income protection, unemployment insurance, retirement benefits, sick leave, release time-vacation (paid and non-paid), social security, paid holidays, and other specialized benefits.

Overhead Expenses- overhead expenses for the operation of the project are the ongoing expenses that are necessary for the continued functioning of the business operations. These expenses include accounting fees, advertising, depreciation, insurance, interest, legal fees, rent, repairs, supplies, taxes, telephone, and utility costs, and other associated expenses necessary for the business operation of the project team firms.

General & Administrative Expenses (G&A) -General and

Administrative expenses calculated are related to the day-to-day operations for a portion of the time allocated to the operation of the project. These expenses pertain to operation expenses rather than other direct expenses that are identified in the cost proposal.

Equipment

The only one-time expense will be the purchase of data for the project if needed.

Travel

No travel expenses are anticipated

Contractual

Contractual expenses may be associated with any architectural design concepts





SECTION VI

Resumes



Ed Holmes, AICP

President at EHI Consultants

Ed Holmes has been providing professional services to DOE for the past 22 years starting in Paducah providing board support services to the Citizens Advisory Board and growing to work with the Portsmouth, Ohio Site Specific Advisory Board and more recently, supporting the DOE Carlsbad, New Mexico – Carlsbad Field Office site.

Mr. Holmes has extensive land use and comprehensive planning experience, first serving as a land use planner and then Director of Planning for the Bluegrass Area Development Districts (BGADD) Division of Planning, where he led the districts comprehensive planning efforts for the 17 county Central

Kentucky regional planning agency. While at the BGADD, he had written over 30 comprehensive plans, subdivision regulations, zoning ordinances and other planning and regulatory codes and ordinances. With some of the most notable plans being the; Versailles Woodford County Comprehensive Plan that was recognized by the Kentucky Chapter of the American Planning Association with an award for its efforts in developing innovative rural land planning standards, Berea, Kentucky Comprehensive Plan, City of Midway, Kentucky Comprehensive Plan, Scott County Comprehensive Plan and the Frankfort Franklin County Comprehensive Plan.

Special Qualifications

- 40+ years of experience in land use and comprehensive planning
- 16 years as planning director for the Bluegrass Area Development District
- 7 years as Vice Chair of the Kentucky Public Service Commission

Professional Credentials

- Bachelor of Arts, Urban Planning & Design, University of Cincinnati

Professional Organizations

- American Institute of Certified Planners
- American Planning Association – Kentucky Chapter

Relevant Experience

- Lexington-Fayette Urban County Government- Small Area Plans (East End, Winburn, Armstrong Mill, Davis Park Community Land Trust)
- Lexington-Fayette Urban County Government, Sustainable Growth Study, Lexington, KY
- KYTC, Newtown Pike Extension/Southend Park Urban Village Plan, Lexington, KY
- Lexington-Fayette Urban County Government, Infill and Redevelopment, Lexington, KY
- Magoffin County Fiscal Court, Comprehensive Economic Development Plan, Magoffin, KY
- Franklin Forward 2040 Comprehensive Plan, Franklin, KY
- Inner City Revitalization Housing Assessment- Hopkinsville, KY
- Lexington-Fayette Urban County Government, Opportunity Zone Report, Lexington, KY



Ryan Holmes, AICP

Principal | Urban Planner

Mr. Holmes possesses more than 16 years of expertise in land use and regulatory planning. His professional focus lies in master planning, sustainable design, and greenfield redevelopment strategies, with a strong emphasis on community revitalization, enhancing quality of life, and fostering economic development. Throughout his career, he has authored numerous comprehensive

plans, subdivision regulations, zoning ordinances, and other planning and regulatory codes, many of which have been recognized by the Kentucky Chapter of the American Planning Association for their innovative approach to urban and rural land planning standards.

Special Qualifications

- Kentucky Workforce Innovation Board Member
- Lexington Industrial Authority Board Member

Professional Credentials

- Bachelor of Science Business Administration, Finance, University of Louisville
- Master of Business Administration, Real Estate, University of Cincinnati
- Master of Community Planning, Land Use, University of Cincinnati

Professional Organizations

- American Institute of Certified Planners #29418
- American Planning Association – Kentucky Chapter

Relevant Experience

- Franklin Forward 2040 Comprehensive Plan, Franklin, KY
- KYTC, Newtown Pike Extension/Southend Park Urban Village Plan, Lexington, KY
- Louisville Metro, Preston Corridor Master Plan, KY
- Louisville Metro, Broadway Master Plan, Louisville, KY
- KYTC, I-65 Corridor Planning Study, Louisville, KY
- Louisville Metro, Louisville Comprehensive Neighborhood Plans, Louisville, KY
- Louisville Muhammad Ali International Airport Master Plan, Louisville, KY
- Town Branch Commons, Lexington, KY



Thomas Benford

PLANNER

Education

Bachelor of Art, Communication, University of Louisville

Experience

Mr. Benford is a graduate of the University of Louisville with prior experience in land use planning, and environmental planning. Mr. Benford has worked with public outreach while helping to develop neighborhood and comprehensive plans throughout central Kentucky. Mr. Benford has collected and analyzed data from field evaluations and participates in facilitating public meetings.

Relevant Experience

OHIO RIVER BRIDGES PROJECT

Kentucky and Indiana

This project is designed to improve safety, alleviate traffic, connect highways and create economic development. EHI was tasked with evaluating the potential impacts of tolls, lead public outreach efforts, and recommend measures for mitigating impacts on environmental justice populations.

SHERMAN MINTON BRIDGE RENEWAL

Kentucky and Indiana

EHI was tasked with providing public outreach to environmental justice (EJ) populations in southern Indiana and Louisville, Kentucky. EHI facilitated public meetings as well as creating a technical committee that was tasked with providing feedback from (ej) communities located in and around the project area.

NEWTOWN PIKE EXTENSION

Lexington, KY

The newtown pike extension project includes revitalization of the Davis Bottom neighborhood. Lexington community land trust and the Kentucky Transportation Cabinet are working together to provide affordable housing and commercial development.

LOUISVILLE COMPREHENSIVE NEIGHBORHOOD PLANS

Louisville, Kentucky

EHI developed several comprehensive neighborhood plans for Louisville Metro. EHI worked with residents, businesses, and institutions to collaboratively address issues and to facilitate urban design elements that promote sustainability and economic development.



Adam Klier

PLANNER

Education

- Bachelor of Science, Urban & Regional Studies, Cornell University
- Associate of Arts, Arabic Language & Culture, Defense Language Institute

Experience

Adam is a Planner with 7 years of experience in municipal, land use, and regulatory planning. He has worked on projects ranging from urban design for adaptive reuse to open space preservation to drafting sign ordinance. Adam has developed an interest and experience in urban design focused on sustainability, green infrastructure, and multi-modal transportation. He has provided key written communications both for general public engagement and technical reports on projects ranging from multi-use trails to comprehensive plans.

As an EHI team member, Adam has helped facilitate a variety of public input sessions including design charrettes, public input & feedback, stakeholder meetings, and interagency coordination.

Relevant Experience

- **FAYETTE COUNTY OPPORTUNITY ZONE ANALYSIS**
LEXINGTON, KENTUCKY

Adam performed extensive demographic analysis and zoning analysis of opportunity zones in Lexington KY. EHI worked with residents, businesses and institutions to analyze and facilitate opportunity zones that promote sustainability and economic development within Fayette County, Kentucky.

- **BOURBON COUNTY MASTER PLAN**
BOURBON COUNTY, KENTUCKY

Adam provided GIS shape files for zoning and land-use. Produced maps for stakeholders to better understand the future land-use analysis and recommendations.

EHI engaged stakeholders to provide an updated vision of land-use possibilities in and around the Bourbon County area.

- **FAYETTE COUNTY SUSTAINABLE GROWTH STUDY**
LEXINGTON, KENTUCKY

EHI was tasked with forming a stakeholder engagement plan for the consultation team to determine policy adjustments of the Future Growth Boundary and Exactions program in Lexington, KY.

EHI proved stakeholder engagement through a series of online video calls targeted at local businesses, real estate brokers, environmental groups, agricultural landowners, and government organizations.

Carrie Berend

Education

- St. Edward's University, Austin, TX
BA in Religious Studies, Summa Cum Laude
May 2005

Boards

Central Kentucky Housing and Homeless Initiative
Board Member,
2023-present

Relevant Experience

Core Staff Member July 2022-present, June 2020-October 2021, September 2016-February 2018

Volunteer Coordinator February 2008 – April 2013
Catholic Action Center, Lexington, KY

- Coordinated Connector Teams of volunteers assisting families in FCPS with finding and moving into permanent and transitional housing
- Supervised homeless veterans transitional housing program
- Helped facilitate awareness events along with individuals experiencing homelessness including See Me, Hear Me, Know Me conversations and Please Don't Call Me Homeless, I Don't Call You Homed play
- Led volunteer Connector Teams to help individuals and families applying for rent and utility assistance and coordinated with our court observers to quickly reach those evicted
- Scheduled and coordinated individual and group volunteers for the day center, night shelter and donation warehouse and assisted in the opening of a new night shelter and day center

Front Desk Agent January-May 2022

Inn at the Convention Center, Portland, OR

- Welcomed and checked in guests, received reservations, responded to phone and email inquiries, and processed payments
- Worked with city social service agencies and their clients who temporarily lived in the hotel

Customer Service Representative June 2018-August 2019, July 2013-July 2016

Marsee Baking, Portland, OR

- Answered phone/email communications, processed orders and prepared reports for bakers
- Operated outlet store, selling product and assisting walk-in customers

Immersion Coordinator August 2005-July 2006

JOIN: Connecting the Streets to a Home, Portland, OR

- Coordinated and facilitated homeless immersion programs for junior high, high school, college and adult groups
- Organized and supported immersion presenters who had lived experience with homelessness
- Coordinated and led annual Portland Plunge week-long homeless immersion program for high school youth
- Coordinated day center basic services: voicemail boxes, showers, lockers, mail and phones

Paraprofessional January 2004-May 2005

School of Management and Business, St. Edward's University, Austin, TX

- Received SMB Outstanding Service Award – December 2004
- Assisted students, professors and visitors, and maintained schedules for student advisors

Jarred W. Paul

3429 Malabu Circle Lexington, Kentucky 40502

Education

- MBA, partial completion, Western Kentucky University, Bowling Green, KY
- BBA in Finance 2008, University of Kentucky, Lexington, KY

Board Appointments

- Central Kentucky Housing and Homeless Initiative, Inc
2001-Present, Vice Chair
- Bob Brown House/Independence Homes, Inc
2001-Present, Board Member

Relevant Experience

Traditional Bank, Lexington, KY

Commercial Lending Officer, 2016-Current

- Originate and maintain a complex commercial portfolio comprised of various commercial loans. Examples include apartment complexes, healthcare/private practice, land development, warehouses, single family/commercial construction, lines of credit, retail, low-income housing, and mergers & acquisitions. Approximately \$105 million under management.
- Responsible for funded debt growth of \$8,000,000 or more annually with minimal loss.
- Responsible for negotiation, collection, structure, monitoring, and administration of all aspects of the lending function.
- Works with outside entities to better loan structure and mitigate risk (SBA, KEDFA, Federal Reserve Bank, etc.).

Central Bank & Trust, Lexington, KY

Commercial Mortgage Lending Officer, 2014-2016

- Originated and maintained a commercial portfolio substantially similar to that held at Traditional Bank above. Approximate portfolio size of \$50 million.
- Negotiated loan terms with customers to get the maximum return for the bank and mitigate risk as much as possible.
- Solicited new business and developed new relationships with clients.
- Evaluated credit worthiness and extended loans for satisfactory projects with appropriate loan structure.
- Lead bank participation lender on multiple loans.

- Worked under deadlines with performance goals.
- Collected past due accounts to minimize loss.

Credit Analysis Officer, 2014

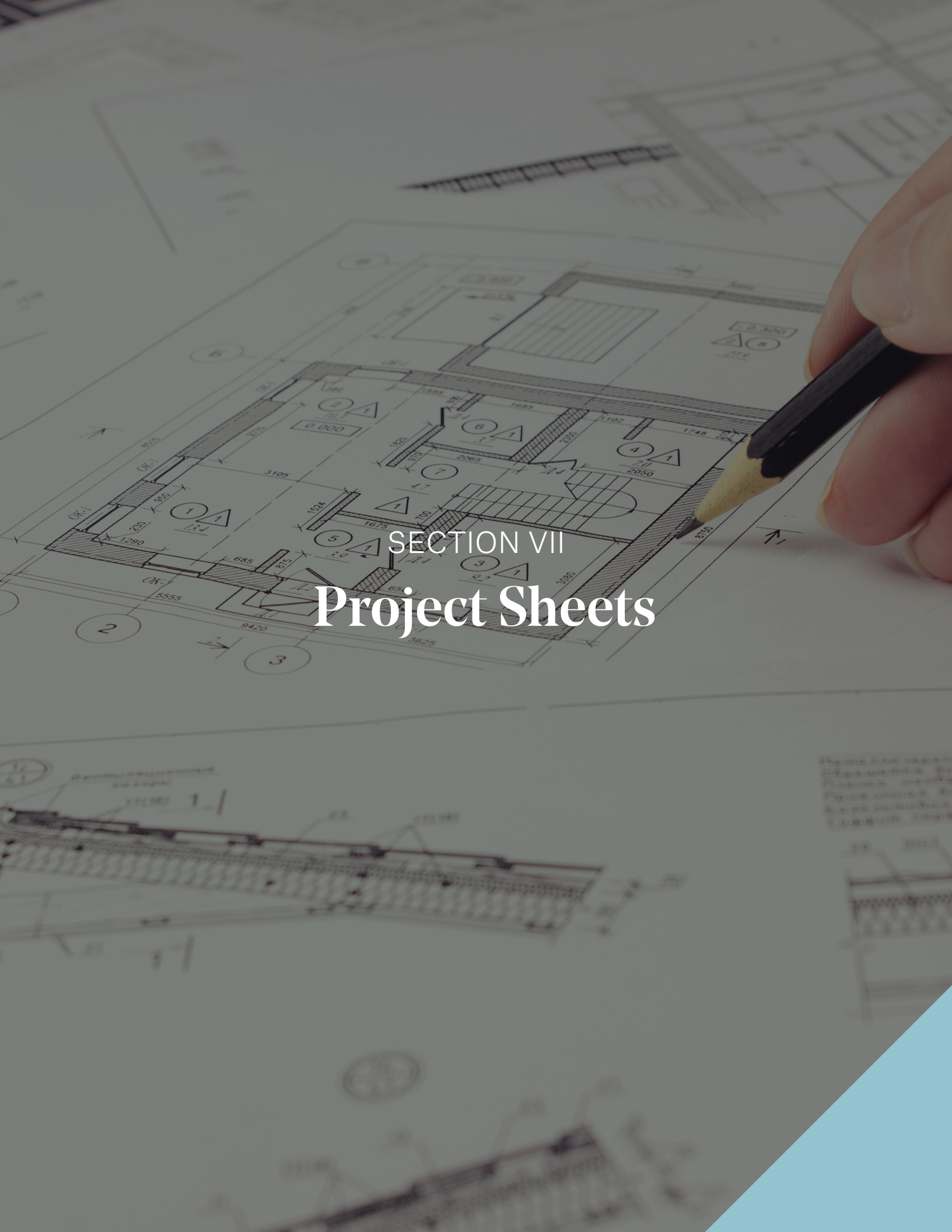
- Performed credit analysis on credit requests in excess of \$500,000.
- Prepared spreads and cash flows on businesses and individuals associated with credit requests.
- Performed market and industry analysis to evaluate external risk factors which may impact loan performance.
- Accompanied lenders on customer calls to grow relationships and further evaluate credit needs.
- Recommended credit enhancements and/or loan structure changes as needed in order to mitigate risk.
- Performed vendor analysis on service providers the bank uses to ensure the company can support needs of the bank as well as continued operations should the vendor be chosen.
- Prepared various specialty reports and completed special projects as assigned.

Commercial Real Estate Officer, 2009-2014

- Maintained credit relationships with specific large borrowers.
- Approved all draws on construction loans greater than \$1,000,000.
- Reviewed and audited all draws on construction loans less than \$1,000,000.
- Reviewed specific large loans, minimizing risk of loss.
- Analyzed borrower financial data as needed.
- Authored reports for examiners, various committees and the board of directors as necessary.
- Visited construction sites and completed construction inspections as needed.
- REIS system owner/administrator, completed CRE evaluations which qualify under internal standards.
- FIMAC system owner/administrator, stress tested the CRE portfolio for Central Bank & Trust and Central Bank of Jefferson County.

Loan Processor, 2008-2009

- Created new commercial and consumer loan documents consisting of RE construction, RE purchase, RE refinance, as well as auto, boat, and various other types of loans.
- Prepared loan modification, letters of credit, workout, and renewal documents.
- Worked with loan officers satisfy loan needs of their clients.
- Worked with FEMA, insurance companies, attorneys, and other agencies to ensure all collateral was properly secured and documented.
- Ensured the lender's loan requests and expectations were within bank guidelines.
- Effectively managed several projects simultaneously.



SECTION VII
Project Sheets

REFERENCE:

Office of the
Commissioner

Tiffany Masden

859.280.8275

Date of Performance:

2024- Present

LFUCG AFFORDABLE HOUSING STUDY

LEXINGTON, KENTUCKY



The Lexington-Fayette Urban County Government (LFUCG) established a locally supported Affordable Housing Fund in 2014, allocating \$38,500,000 to date. With the onset of the COVID-19 pandemic, the rental market faced upheaval, underscoring the need for a comprehensive reassessment of housing affordability in Lexington. EHI Consultants has undertaken the task of conducting this study to address the evolving challenges in the housing landscape.

EHI is creating a comprehensive assessment of housing affordability in Lexington, emphasizing the current and future need for affordable housing units. The study will not only quantify the number of units required, but also delve into specific unit types, sizes, costs, and geographic placements. Additionally, the study will examine the interconnection between affordable housing and childcare accessibility, highlighting the impact of childcare availability on the workforce and regional economy. By addressing the interconnectedness between affordable housing and childcare, the study aims to provide actionable insights to inform policy decisions and investment strategies. EHI is committed to delivering a comprehensive analysis that identifies innovative solutions to enhance housing affordability and childcare accessibility, fostering economic prosperity and social equity in Lexington.

REFERENCE:

Lexington-Fayette Urban

County Government

Jim Duncan

859.258.3172

Date of Performance:

2008-2009

LEXINGTON-FAYETTE URBAN COUNTY GOVERNMENT HOUSING MARKET STUDY

LEXINGTON, KENTUCKY



EHI was part of the project team that conducted the LFUCG Housing Market Study. The purpose of this study was to identify several key findings related to the provision of housing within Lexington-Fayette County. This included the regional share of housing, net migration of households within the region, income distribution within Lexington's housing market, supply and demand, consumer preferences, redevelopment, and affordable housing issues.

As part of the project team, EHI advised and assisted on all tasks throughout the housing study as well as focused on research of existing affordable housing providers within Lexington-Fayette County, identifying issues related to affordable housing within the Lexington community and developed affordable housing strategies.

This Housing Market Study is to be utilized by Lexington-Fayette Urban County Government to assist with future policy decisions as well as provide information to local agencies and businesses in the area that may have an interest in housing within Lexington and Fayette County.

REFERENCE:

City of Mount Sterling

Dr. Edward Roberts

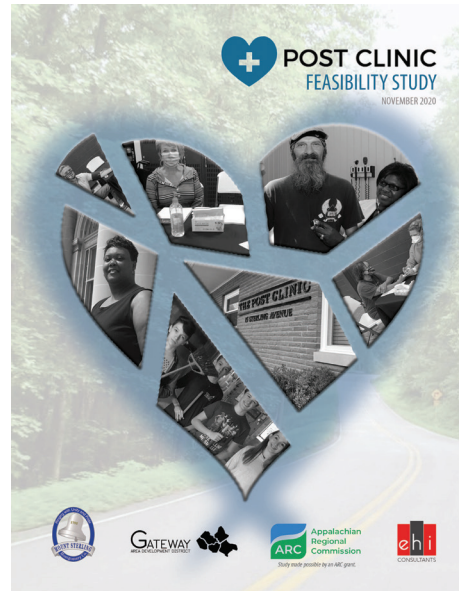
859.498.0231

Date of Performance:

2020- 2021

ECONOMIC IMPACT AND FEASIBILITY STUDY

MOUNT STERLING, KENTUCKY



EHI Consultants conducted an economic impact and feasibility study for the City of Mount Sterling. The study provided a detailed analysis for a proposed new clinic facility to provide free primary health and dental care to primarily employed patients who are uninsured or under-insured. Currently, the Post Clinic is at an operational capacity in the current facility due to the high costs of operations in an inefficient older building, lack of ADA accessibility, damp storage areas, and the challenge of recruiting new providers and volunteers to work in a dilapidated facility. EHI helped to determine the viability and practicality of constructing a new facility for a free clinic in Mount Sterling, Kentucky, while examining other potential alternatives.

The Post Clinic is currently located in a 4,400 square foot building donated to the Clinic from a local family with long- standing ties to the medical community. The Post Clinic uses the building to house both medical and dental services. A decision was made to seek funding to construct a new facility for the Post Clinic. The proposed new facility will be approximately 3,732 square feet and will be located adjacent to the existing Post Clinic building. Funding for construction of the proposed facility will come from two grants; the Kentucky Department for Local Government has committed \$500,000 of Community Development Block Grant (CDBG) funds, the remaining construction funds from a grant from the Appalachian Regional Commission (ARC).

REFERENCE:

City of Paris

Anna Allen Edwards

859.285.3062

Date of Performance:

2017- Present

WEST SIDE NEIGHBORHOOD PLAN

PARIS, KENTUCKY



EHI Consultants recognizes the importance of creating healthy, vibrant, and sustainable neighborhoods where every community member has equal access to a good quality of life. Unfortunately, many communities, particularly minority and low-income neighborhoods, face barriers to accessing safe, healthy, and sustainable environments. Economic inequalities and concentrated poverty often result in limited resources and services, impeding the development of equitable neighborhoods.

To address these challenges, EHI is collaborating closely with the City of Paris Board of Commissioners to spearhead a comprehensive community engagement process for the West Side Neighborhood. Building upon the recommendations outlined in EHI's 2020 West Side Neighborhood Strategic Action Plan, we are working in coordination with the planning office to implement strategies that promote inclusivity and community development.

Through our active engagement efforts, we are actively involving residents and stakeholders in the process. Our goal is not only to identify the issues and challenges faced by the community but also to discover local assets, resources, and innovative ideas that can contribute to neighborhood improvements. Some of the tasks we are undertaking include organizing an annual community festival, creating West Side Neighborhood branding and identity, facilitating quarterly neighborhood meetings, and providing guidance on digital engagement strategies.

:

Op Ed - Submitted by:

Ginny Ramsey,

Director and

Co-Founder of the

Catholic Action Center

HOMELESSNESS ISN'T A CRIME AND DOESN'T BELONG IN KY HB 5

LEXINGTON, KENTUCKY

- Lexington Street Voice Council hosted a Frankfort luncheon on Feb. 7 to give KY lawmakers the opportunity to see them, hear their stories and understand the reasons they are experiencing homelessness. Over 65 legislators shared a meal with those who would be impacted by the criminalization of homelessness in HB 5. They heard about their childhoods: their favorite pet and life influences. Legislators were courageous to share this sacred time with men and women who are often “invisible.”
- Some paint the face of homelessness as one of irresponsibility, addiction and criminality; those who choose to be unsheltered. Many “Think Tanks” and “Institutes” are quick to blame the individuals because if we blame and criminalize the people, it becomes their fault. This narrative is dangerous: it allows society to abdicate responsibility for those who are broken and disconnected. It allows the belief that none of us are responsible: not government, not churches, not communities. Accepting that, Christians and people of all faiths can dismiss the call to care for the least of these.
- A “Think Tank” used a 1500 participant survey to paint the picture that Kentuckians favor criminalizing homelessness by framing the unsheltered as addicts and criminals. SVC with partners surveyed over 2000 Kentuckians on actual impacts of HB 5; responses were overwhelmingly against the provisions that criminalized the unsheltered. The SVC survey noted that it is unlawful NOW, without HB 5, for any citizen to trespass, loiter, destroy property or commit crimes. 85% said HB 5 provisions do NOT make KY safer but burdens safety officers to cite, arrest, jail lawful unsheltered citizens when no shelter beds are available.
- So, if the majority of those on our streets are not addicts and criminals, then what is the cause of homelessness and who are they? After 24 years of hearing their voices, getting to know their stories, walking with them from the streets to a home, my unwavering belief is poverty is the cause and they are the poor.
- Whether it be the single mom of 4 who lived on the brink when car repairs and health issues tipped the family into homelessness, or the elderly gentleman who lost his wife and was unable to function in his grief until he lost his home. There are addicts and criminals who are unhoused, just as there are addicts and criminals who are housed, but the vast majority of those experiencing homelessness are NOT addicts and criminals, just poor.
- We know wages are not keeping up with rental costs and affordable housing is in short supply. The working poor cannot withstand illness, auto repairs, or other unexpected expenses.
- Please do not put our fellow Kentucky homeless families, disabled/elderly citizens, struggling men and women in the picture that is painted of irresponsibility, addiction and criminality. These folks are left with nowhere to go—shelters are full, services are overwhelmed, and they are suffering. Let us address those issues and be the Kentucky that finds solutions!
- Your voice needs to be heard:
Call your legislators and tell them NOT to criminalize homelessness!
- Information on KY Citizen Survey on the Criminalization of Homelessness
- and The Street Voice Council at:
www.catholicactioncenter.net