



City of Ketchum

June 13, 2022

Mayor Bradshaw and City Councilors
City of Ketchum
Ketchum, Idaho

Mayor Bradshaw and City Councilors:

Review and Discussion Regarding Draft Budget for Annual Housing Action Plan

Recommendation and Summary

Staff has developed a scaled down budget for the first year of the Housing Action Plan due to the Local Option Tax vote not receiving voter approval. Attached is the draft presentation that will be reviewed, as well as the detailed budget document. A recent meeting of the community task force was held to solicit feedback on the budget. Staff is also in the process of requesting feedback from potential implementing partners outlined in the plan.

Introduction and History

In October 2021, the city kicked off the process to create the Ketchum Housing Action Plan. Agnew::Beck Consulting was retained to assist with the creation of the plan as they have extensive similar experience in several western communities. In addition, the city retained Carissa Connelly (Housing Strategist) to serve as local project manager.

The city created a community task force to assist in the creation of the plan. The task force held several meetings to provide feedback on the development of the plan. Staff held a series of meetings with potential implementing partners outlined in the plan to ensure alignment should the plan be approved and funded. Three phases of significant community engagement were conducted to solicit feedback on the development of the plan. The City Council formally adopted the plan on May 9th.

Task Force Feedback on Draft Budget

There were varied responses on five topics:

1. *Landing Locals investment*: One Task Force member emphasized the need for more data to determine how much to invest. Others believe that since the incentive is only paid out with a match, that we should proceed with this investment. They also emphasized, since we are tracking progress, if there are unspent funds then we can divert them to another Action that may not have yet received funding – like a homeownership + deed restriction program.
2. *Staffing*: A couple of Task Force members brought up concerns with the large percentage of benefits that Ketchum provides, stating that we should consider just using consultants or providing alternative benefits under different entities like the County or a standalone agency. Another commended the City for the level of benefits and compensation, particularly given the current market.
3. *Implementers of Goal 3: Create + Improve Services to Create Housing Stability*: One member asked for clarification regarding which entities would best be suited to implement some of these actions.
4. *Increase ADU incentives*: One Task Force member requested that we increase potential funding incentives to build and occupy more ADU's.

5. *Demonstrate impact:* Many members believe that during this year we can demonstrate the impact of the Housing Action Plan and take a coordinated approach. Through Goal 5: Inform, Engage and Coordinate, the housing staff can clarify and educate on specific actions.

Immediate Funding Requests

Goal 1: Create and Preserve Housing, Goal 3: Expand + Improve Services to Create Housing Stability

Action 6: Identify and support policy changes that increase access to housing, including eligibility requirements. Analyze compliance processes, inventory and deed restriction enforcement.

BCHA contracted with a third party to audit tenant and homeowner files for deed-restricted units and clarify policies and procedures. Once this is complete, this third party has the capacity and skills to monitor compliance going forward. This agency would act as the back-office expertise to screen applications and process annual recertifications. Their fee is \$2,675/month (proposal attached). The agency would work closely with BCHA's Program Administrator, who – among other tasks – will enforce compliance, assist in filling out applications and understanding the process, create and maintain a housing one-stop shop with associated database of housing availability, and otherwise be the customer service provider for BCHA's deed restricted units. Note that the majority of BCHA's units are within Ketchum.

Goal 5: Inform, Engage, + Collaborate

Action 5: Launch coordination process with Action Plan implementation partners

Action 6: County-wide housing coordination

- *Participate in and support launch of a county-wide housing coordination effort*
- *Explore intersection with cross-sectional efforts, such as smart growth and regional sustainability planning*
- *Initiate quarterly coordination meetings with other jurisdictions*

Agnew::Beck is both a skilled facilitator and familiar with housing challenges throughout Blaine County. The County-wide Jurisdictional meeting on June 27th has 53 invitees and the Implementation Partner meeting (now set for August) potentially has over 20 invitees. For large-scale and cross-interest meetings, a third-party facilitator experienced in these forms of meetings can provide objective structure. Agnew::Beck would co-facilitate with Ketchum's Housing Strategist, with the aim of transitioning to the Housing Strategist fully facilitating such meetings in the near future. Agnew::Beck's fee for these first two quarterly meetings is \$3,775.

Upcoming Funding Requests – time-sensitive

The following requests are time-sensitive due to implementing partners' capacity and timing.

Goal 1: Create + Preserve Housing

Action 8: Incentivize long-term rentals: Implement "Lease to Locals" workforce rental program.

The Landing Locals team, Colin and Kai Frolich, are visiting Ketchum and Blaine County June 21st to 24th. This trip will clarify potential program parameters and investment interest. If, by the end of their trip, there is clear desire to invest the minimum of \$500,000 in their program then they can launch early Fall. Otherwise, if it is unclear whether they will be funded, they will proceed with launching in other jurisdictions. They would then not be able to launch in Blaine County for at least a year, given the number of other jurisdictions willing and ready to launch.

Goal 5: Inform, Engage, + Collaborate

Action 9: Maintain internal capacity to staff key housing actions, initiatives, and community engagement.

Implementing the Housing Action Plan, including county-wide coordination, requires a reliable, adequate and capable organizational structure. The Interim Executive Director is eagerly anticipating a shared housing department that combines Ketchum's housing capacity with BCHA. Without an Interim or acting Executive Director Staff, the process of managing, improving, and ensuring compliance and application processes stalls.

Staff is working to draft a Memorandum of Understanding to propose to the Council and the County where this shared housing department would be on the City of Ketchum's staff. Ketchum's Housing Strategist is reluctant to cross-over to, or share responsibilities with, the existing Blaine County Housing Authority in advance of such an

MOU and clear and adequate staffing support due to the risk in implementing the Housing Action Plan. Staff anticipates a recommendation to transition Ketchum's Housing Strategist to City staff alongside an MOU with the County and BCHA, in advance of next year's budget cycle.

Other Upcoming Funding Requests

Staff has prioritized HAP actions for June to August that are necessary first steps for other actions, such as preparing infrastructure, developing a cadence to coordination, or actions implementable given staff capacity. These are expected funding requests within the June to August timeframe.

Goal 1: Create + Preserve Housing

Action 2: Explore joint master plan housing development opportunities on city parcels near the YMCA (in keeping with the parking agreement) and city-owned Lift-Tower Lodge Parcel. Estimated cost of \$25,000.

Action 5: Explore conversion of Forest Service Park buildings for use as transitional or public-employee housing. Estimated cost of \$10,000.

Goal 5: Inform, Engage, + Collaborate

Total estimated cost for all actions in Goal 5 for year 1 is \$131,230 – inclusive of the \$3,775 facilitation costs with Agnew::Beck and staff time with the exception of Action 9 (see below).

Action 9: Maintain internal capacity to staff key housing actions, initiatives, and community engagement.

A couple of staffing/temp components, in addition to the above, require advance preparation to source and onboard:

1. Part-time Fellow: Onboarding a fellow to work remotely during graduate school would greatly augment staff's capacity to conduct policy research, create and maintain a funding database, apply for funds, and create materials and shared messaging for the public's implementing partners' and jurisdictions' consumption. Estimated cost of \$20,000 per year. *Ensures implementation of actions in Goal 2: Update Policy to Promote Housing, Goal 4: Expand + Leverage Resources, and Goal 5: Inform, Engage + Collaborate.*
2. Part-time Administrative Assistance: Administrative assistance would assist with ongoing compliance on existing and new deed restrictions, general administration of BCHA responsibilities, implementation of the housing one-stop shop, logistics on training and educating staff, and logistics on coordinating meetings. Estimated cost of \$26,250 per year. *Ensures implementation of actions in all goals, but particularly Goal 1: Create + Preserve Housing, Goal 3: Expand + Improve Services to Create Housing Stability, and Goal 5: Inform, Engage + Collaborate.*

Sustainability Impact

Adequate community housing decreases the occurrence of trip generation and associated greenhouse gases.

Financial Impact

Staff is recommending the use of existing one-time funds (federal ARPA, General Fund fund-balance) to address the draft budget of \$794,966.

Attachments:

1. Draft PowerPoint
2. Draft detailed budget
3. Housing Action Plan
4. Compliance monitoring and eligibility screening proposal
5. Facilitation Services

KETCHUM HOUSING

Budget Proposal | Year 1 Actions
LOT feedback

City Council
June 13, 2022



BUDGET OVERVIEW

SUMMARY

HISTORIC BUDGET

PROPOSED BUDGET

FEEDBACK

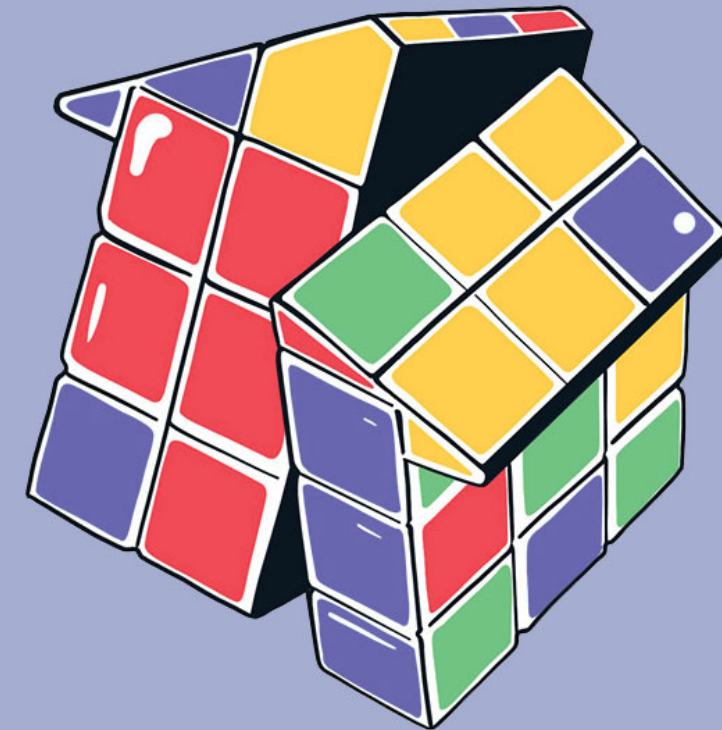
IMMEDIATE & UPCOMING REQUESTS

LOT FEEDBACK

APPENDIX

PROPOSED BUDGET

ALTERNATIVE FUNDING ACTIONS



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SUMMARY

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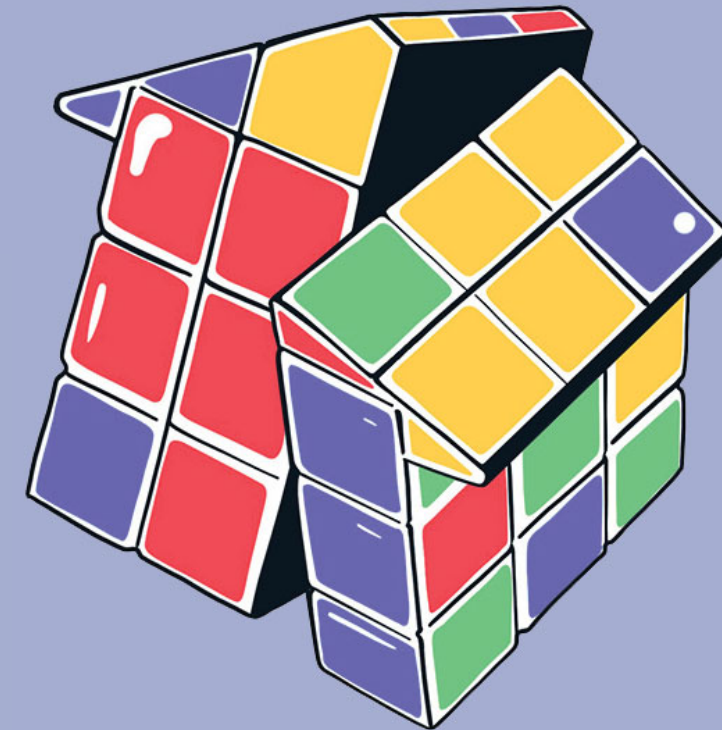
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PROPOSED BUDGET

ALTERNATIVE FUNDING ACTIONS



SUMMARY

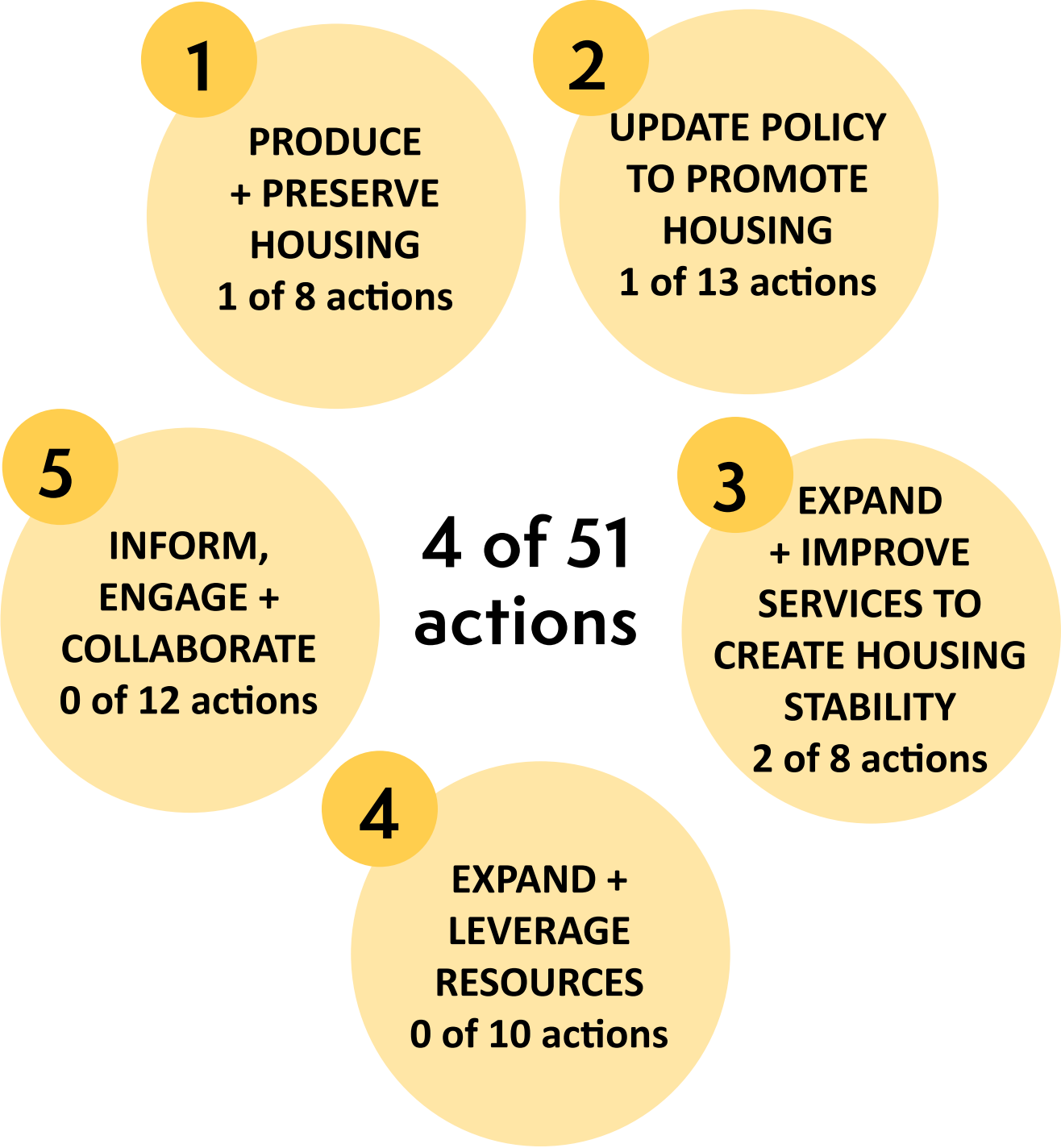
	Revenue	Expenses	Actions
BCHA Historical	\$195,901	\$223,669	4 of 51
Proposed 5B Housing	~\$1.6m	~\$1.6m	48 of 51, except: - <i>preservation</i> - <i>homeownership</i> - <i>temporary housing options</i>

Prioritized actions by: (draft allocation criteria)

- immediate impact
- cost of creation / pilot, ideal vs minimum cost (83% minimum)
- number of households stabilized or housed
- support community housing ecosystem
- fulfils goals of comprehensive plan and other City policies
- meets community identified needs

HISTORICAL BUDGET, BCHA

Revenues		Expenses	
Blaine County	\$75,000	Wages & Benefits	\$155,315
City of Ketchum	\$75,000	Insurance	\$1,609
City of Sun Valley	\$5,000	Professional Fees	\$32,665
City of Hailey	\$3,000	Rent	\$14,850
Rental Income	\$18,900	Office Expenses	\$3,255
Rental Administration	\$9,351	Tech and Website	\$1,228
Community Housing Fees	\$13,657	HOA dues	\$13,309
Grants and contributions	\$14,575	Miscellaneous	\$1,665
TOTAL	\$195,901	TOTAL	\$223,669



PROPOSED BUDGET, 5B HOUSING

Revenues

Blaine County	\$684,510
City of Ketchum	\$843,141
City of Sun Valley	\$0
City of Hailey	\$3,000
Rental Income	\$128,268
Rental Administration	\$9,085
Community Housing Fees	\$5,000
Other Program Income	\$1,192,500
TOTAL	\$1,673,004

Previously
requested funds

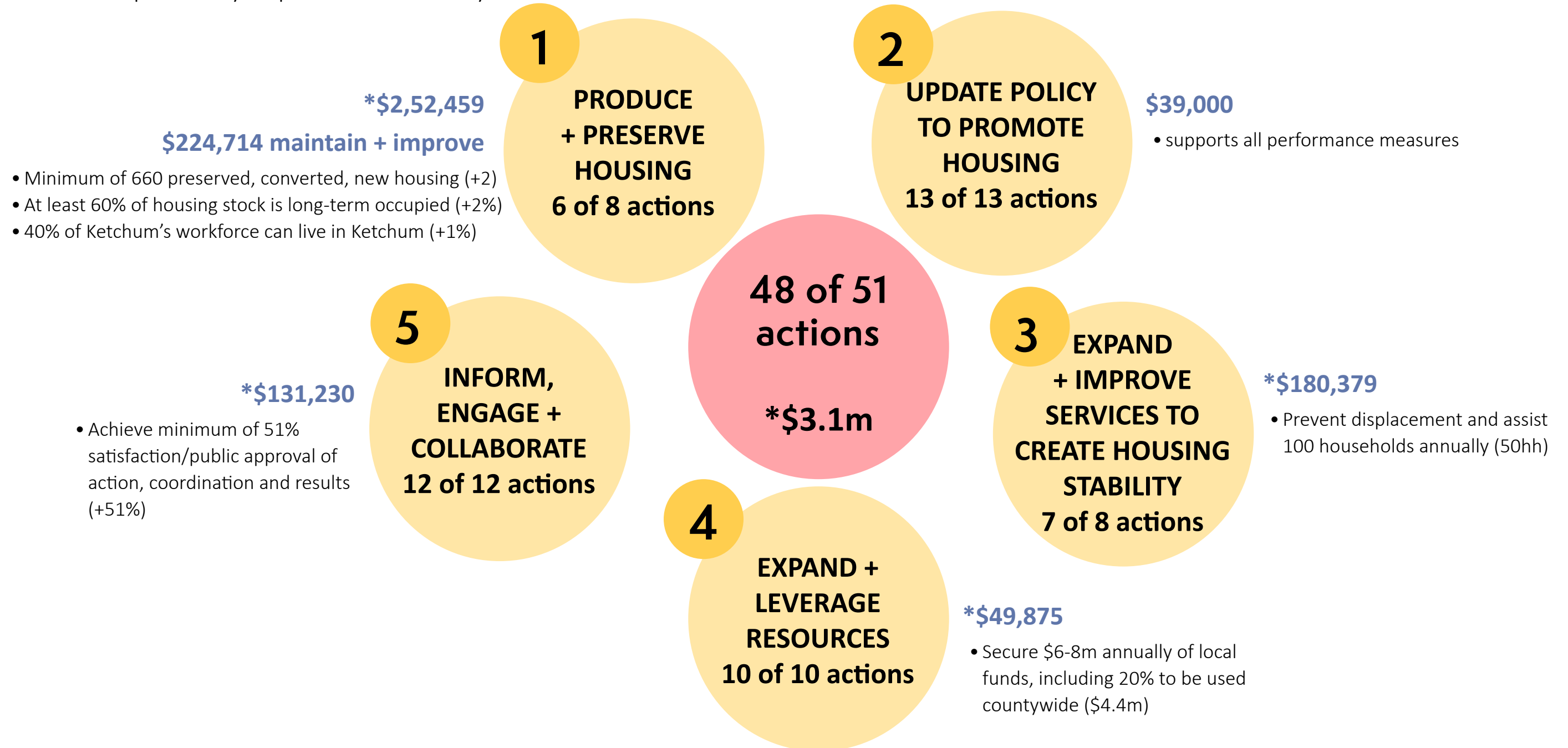
\$1,658,000

Expenses

Wages & Benefits	\$297,134
Lift Tower Lodge	\$35,761
Tidwell Appeal	\$20,000
Rent	\$12,000
Compliance Monitoring	\$32,000
Tech and Website	\$2,800
HOA dues	\$13,309
Miscellaneous	\$1,665
One-Time Expenses	\$63,250
Other Program Expenses	\$1,192,500
TOTAL	\$1,673,004

PROPOSED BUDGET, 5B HOUSING

*Includes previously requested and already allocated funds



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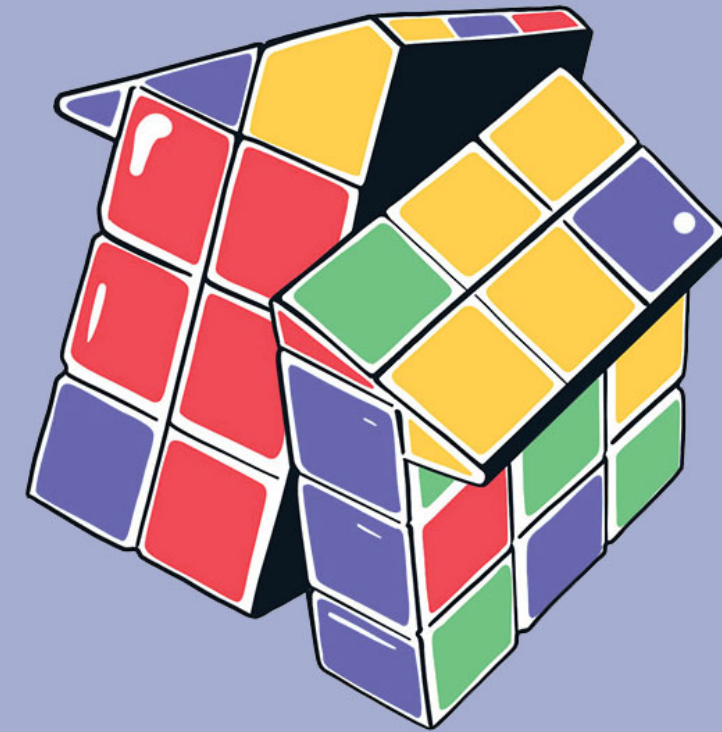
IMMEDIATE & UPCOMING REQUESTS

LOT FEEDBACK

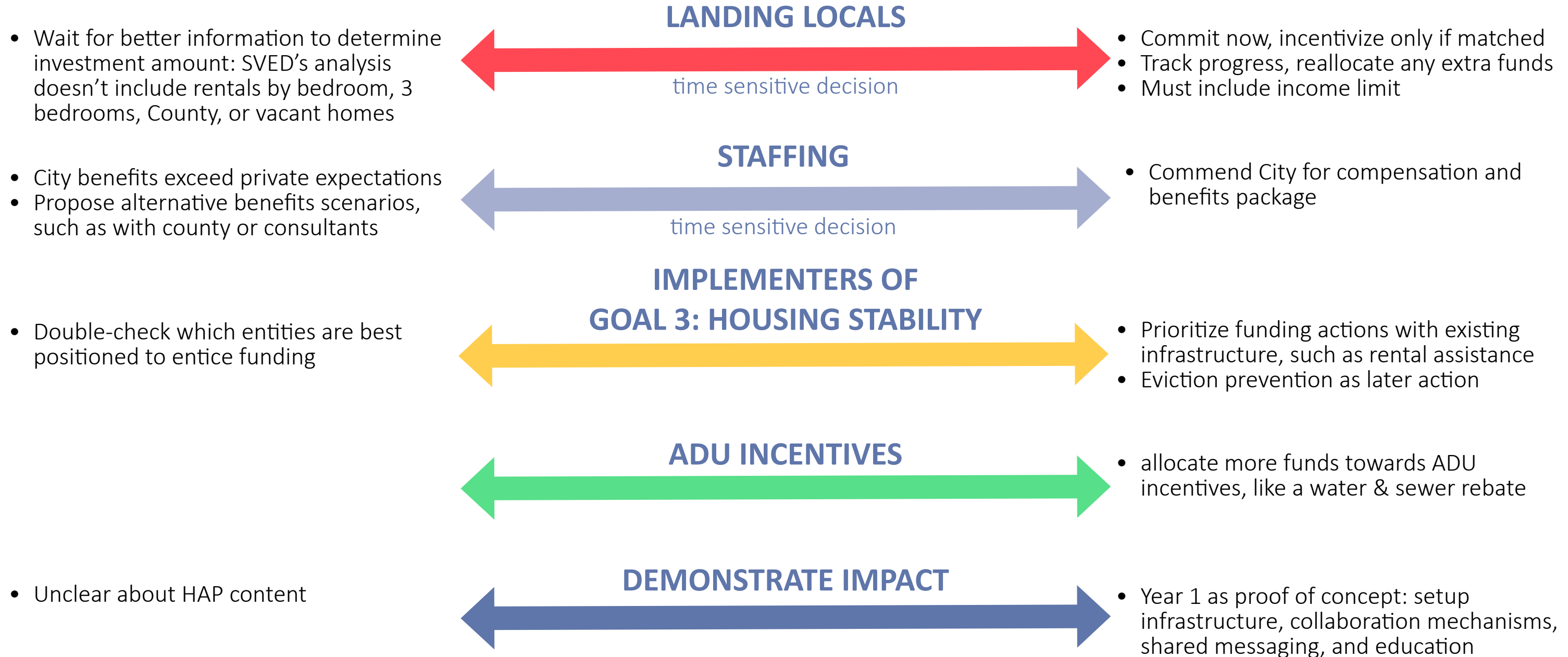
APPENDIX

PROPOSED BUDGET

ALTERNATIVE FUNDING ACTIONS

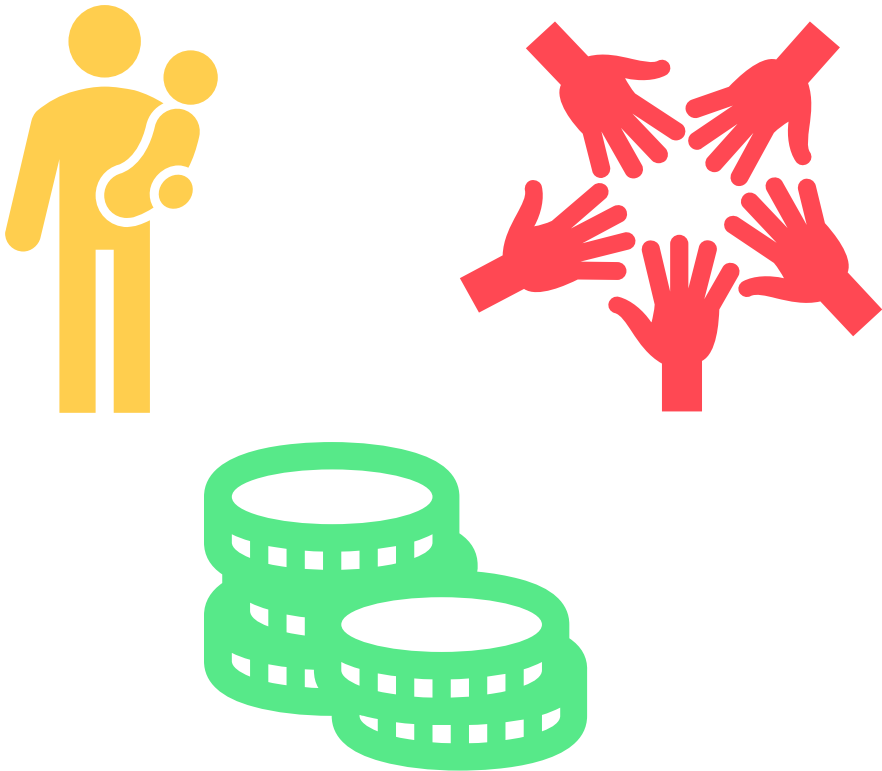


PROPOSED BUDGET, TASK FORCE FEEDBACK



WHAT'S NEXT

Implementation Partner feedback	in progress
Landing Locals	June 21-24
Council Budget Workshop	June 27
Jurisdictional Meeting	June 27
One-Stop-Shop logistics	ongoing
Implementation Partners Meeting	August



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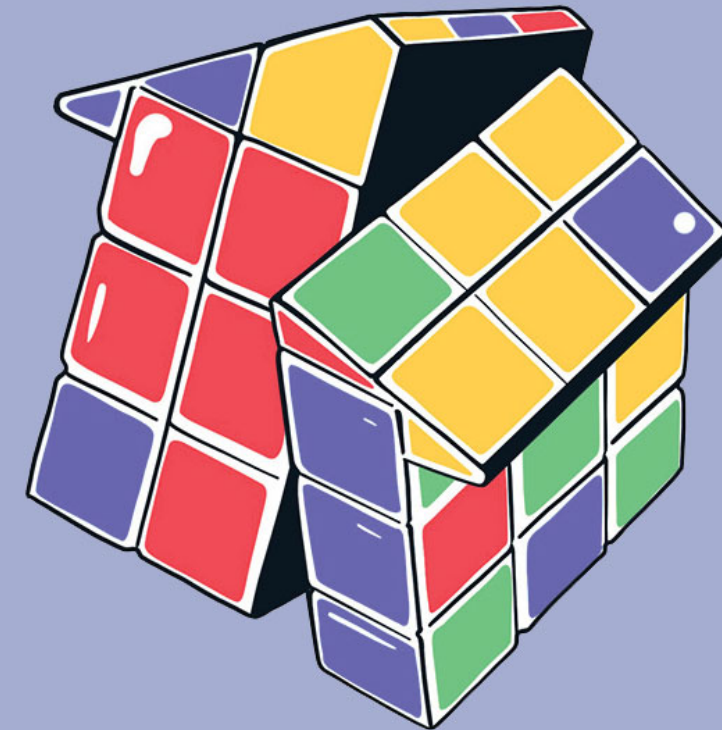
IMMEDIATE & UPCOMING REQUESTS

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ALTERNATIVE FUNDING ACTIONS



IMMEDIATE REQUESTS

1

**PRODUCE
+ PRESERVE
HOUSING**

\$2,675/month

Action 6: Ongoing compliance
for deed-restricted units

5

**INFORM,
ENGAGE +
COLLABORATE**

\$3,775/
1st quarter

Actions 5 & 6: Facilitation of
County-Wide & Implementation
Partner meetings

UPCOMING REQUESTS

time sensitive decisions

1

**PRODUCE
+ PRESERVE
HOUSING**

\$500k

Action 8: Landing Locals launch

5

**INFORM,
ENGAGE +
COLLABORATE**

Action 9: Transition Housing
Strategist to staff, MOU with
County

OTHER UPCOMING REQUESTS

1

**PRODUCE
+ PRESERVE
HOUSING**

\$25k

Action 2: Architect to explore master planning YMCA, Lift Tower Lodge



1

**PRODUCE
+ PRESERVE
HOUSING**

\$25k

Action 5: Historic preservation architect to explore converting Forest Service Park to housing



5

**INFORM,
ENGAGE +
COLLABORATE**

\$131,230

All Actions,
except Action 9



5

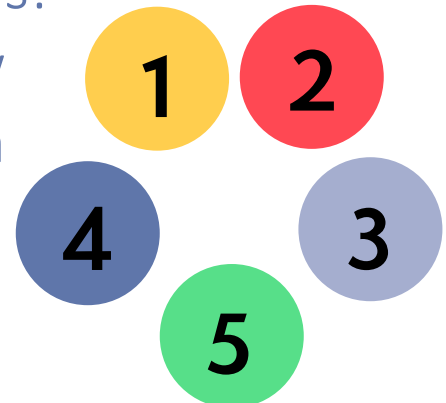
**INFORM,
ENGAGE +
COLLABORATE**

\$20k

\$26k

Action 9 + all Goals:

- part-time Fellow
- part-time Admin



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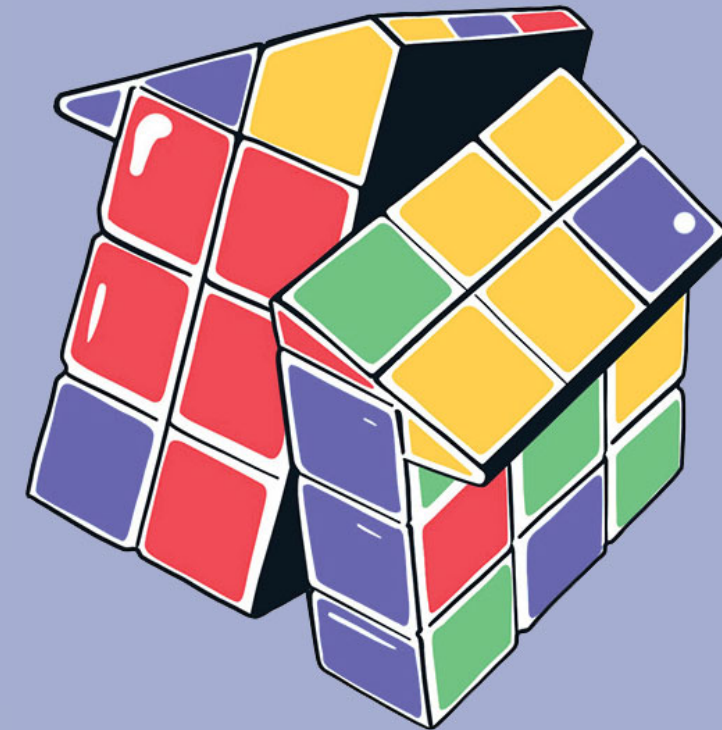
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LOT FEEDBACK

- A couple of strong voices opposed
- Felt rushed, needed more time to understand the

Housing Action Plan

Local Option Tax

What now?

**Next 11 months include HAP Goal 5:
Inform, Engage + Collaborate**

- Monthly updates via social media, listservs, Council meetings
- Quarterly reports, jurisdictional and implementation partner meetings

**More lead time to describe the
essence of LOT proposal, relationship
with other LOT**

intensive engagement on City finances

Thank you!

Carissa Connelly
Ketchum's Housing Strategist
cconnelly@ketchumidaho.org



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FEEDBACK

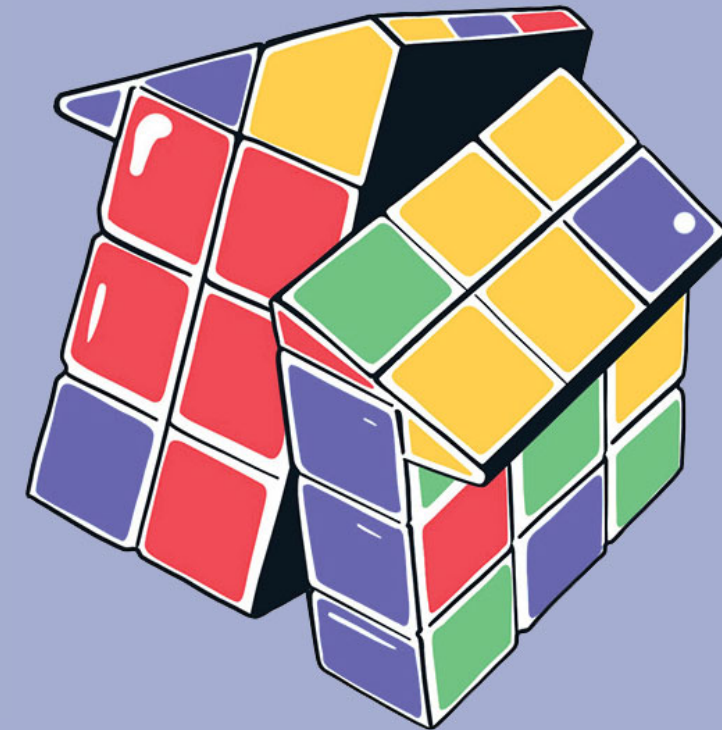
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PROPOSED BUDGET

ALTERNATIVE FUNDING ACTIONS



1

PRODUCE + PRESERVE HOUSING

6 of 8
actions

+2 of 66 deed
restrictions
+2% of 3% occupied
housing stock
+1% of 3% workers
living locally

+15% ED Time

\$2,518,639

includes previously requested
\$1,500,000

Incentivize conversion to long-term rental

Minimum	Maximum	Proposed
\$500,000	\$1,360,000	\$906,000

open source ADU designs

Minimum	Maximum	Proposed
\$9,000	\$109,000	\$50,000

Incentivize new construction

- 1st & Washington
- explore YMCA, Leadville
- Forest Service Park for employees

Minimum	Maximum	Proposed
\$35,000	\$45,000	\$35,000

Previously Requested
of County

\$1,500,000



1

PRODUCE
+ PRESERVE
HOUSING

+10% ED time
\$224,714

● **train program administrator & property managers
on compliance, eligibility**

Minimum	Ideal	Proposed
\$5,000	\$10,000	\$10,000

- Excludes initial audit of files and policies (underway)
- training case worker on outreach and process (tenant screening, eligibility, vulnerable populations, property management)

● **Ongoing compliance on existing and new deed restrictions,
application support and review**

Minimum	Ideal	Proposed
\$65,125	\$106,212	\$106,212

- application assistance, compliance enforcement (Program Admin/Case Worker 50%, Admin Assistance 25%)
- ongoing compliance monitoring

● **Lift Tower Lodge**

Minimum	Ideal	Proposed
\$35,761	\$35,761	\$35,761



● **General Administration**

Minimum	Ideal	Proposed
\$58,922	\$58,922	\$58,922

- Ownership and rental fees
- Advertisements
- Tidwell Appeal
- Rent
- Utilities
- Administrative Assistance (25%)

2

UPDATE POLICY
TO PROMOTE
HOUSING

13 of 13 actions
all targets

+20% ED time
\$39,000

● Specialty legal assistance

Minimum	Ideal	Proposed
\$0	\$10,000	\$5,000



● Policy research assistance - part-time fellow

Minimum	Ideal	Proposed
\$0	\$20,000	\$10,000



3

EXPAND + IMPROVE SERVICES TO CREATE HOUSING STABILITY

7 of 8 actions

50 of 100 households

+20%ED time

\$205,379

Previously requested
\$123,000

Already allocated
\$15,000

● Eviction Prevention: mediation and legal support

Minimum

\$25,000

Ideal

\$100,000

Proposed

\$30,000



● Case management, train on, coordinate & create supportive services

Minimum

\$61,106

Ideal

\$86,106

Proposed

\$61,106



● Create & administer one stop shop for housing applicants



Minimum

\$71,106

Ideal

\$86,106

Proposed

\$71,106



Already Allocated

\$15,000

4

EXPAND +
LEVERAGE
RESOURCES

10 of 10 actions

\$4.4m of \$6m secured

TBD% of city funds used

countywide

+15% ED time

\$49,875

Already Allocated

\$20,000

● Create and maintain project and program pipeline tool
for investors/donors

Minimum

\$20,000

Ideal

\$20,000

Proposed

\$20,000

Already Allocated

\$20,000



● Create & maintain funding database, apply for funding
- part-time fellow

Minimum

\$5,000

Ideal

\$20,000

Proposed

\$5,000



INFORM, ENGAGE +COLLABORATE

includes 20% ED time
\$131,230

Previously Requested
\$15,000

- **Material production (website, newsletter/report, quarterly meetings, annual HAP update + outreach), facilitation, translation, shared messaging, countywide coordination**

Proposed
\$131,230

**Previously Requested
of County**
\$15,000



For full partner updates, meeting summaries, and an expanded Info Hub, visit projectketchum.org

BUDGET OVERVIEW

SUMMARY

HISTORIC BUDGET

PROPOSED BUDGET

NEXT STEPS

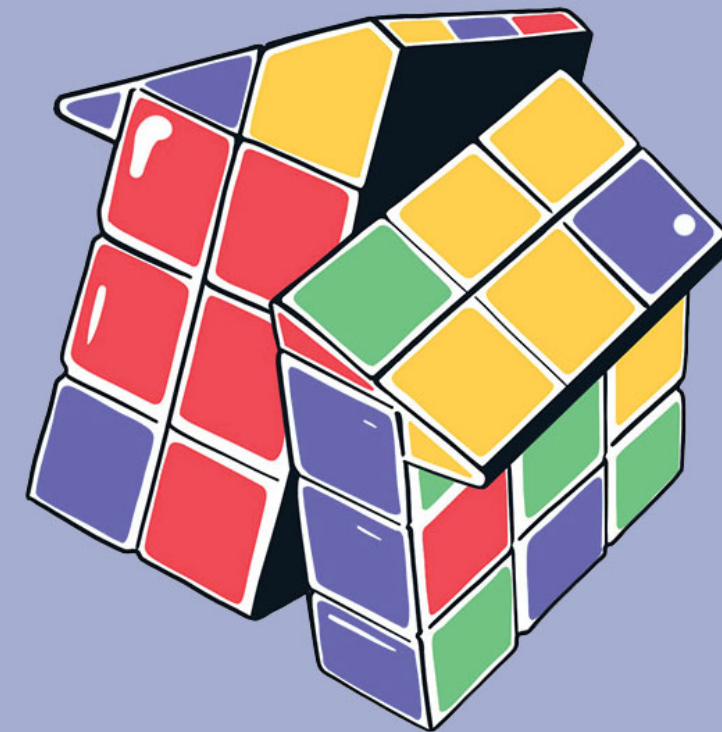
BUDGET DISCUSSION

LOT DISCUSSION

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PROPOSED BUDGET

ALTERNATIVE FUNDING ACTIONS



1

PRODUCE
+ PRESERVE
HOUSING

25 to 75 deed
restrictions

● Preservation: e.g. rehabilitation + deed restriction

Minimum	Maximum	Proposed
\$500,000	\$1,500,000	\$0



● Ownership: e.g. downpayment assistance + deed restriction

Minimum	Ideal	Proposed
\$500,000	\$1,500,000	\$0



3

EXPAND + IMPROVE SERVICES TO CREATE HOUSING STABILITY

170 households

5-10 deed restrictions,
14-30 bedrooms, or
18-40 leases

- Emergency assistance: rent, 1st & last month's rent, security deposit, moving assistance

Minimum

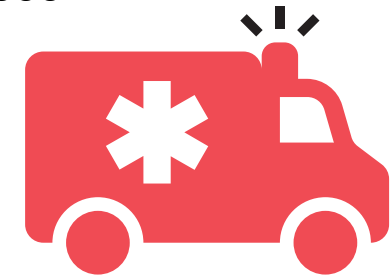
\$0

Maximum

\$382,500

Requested by Blaine County Charitable Fund

\$45,000



- Physical housing options: mobile, prefabricated or tiny homes for emergency and transitional housing

Minimum

\$100,000

Maximum

\$1,000,000

Proposed

\$0



CITY + COUNTY DRAFT
HOUSING OPERATING
AND PROGRAM BUDGET SUMMARY

**FY 2023
PROPOSED**

10-Jun-22

Revenue **\$1,693,004**
Expenses **\$1,693,004**

OPERATING EXPENSES

Income

Contracts for Services total	\$338,151
Blaine County	\$148,510
City of Ketchum	\$148,510
City of Ketchum, benefits contribution	\$38,131
City of Sun Valley	\$0
City of Hailey	\$3,000
CH Administrative Fees	\$5,000
Rental Income, from 2 Elkhorn units	\$18,900
Rental Mgmt Income, Cold Springs Crossing	\$9,085
Rental Income, Lift Tower Lodge (93% occupancy)	\$109,368

Total Revenue **\$480,504**

Expenses

Personel

Salaries	\$185,000
Total Payroll/Benefit Expenses	\$112,134

Total Payroll Expenses **\$297,134**

Lift Tower Lodge

Total LTL On-Site Caretaker Cost	\$2,445
LTL Utilities (Electricity, Gas, Cable, Trash, Sewer)	\$17,160
LTL Snow Removal	\$3,500
LTL Supplies	\$3,500

LTL Maintenance & capital reserve	\$7,656
LTL Other	\$1,500
Lift Tower Lodge Operations Total	\$35,761
General and Administrative	
Ads	\$3,000
Dues & Subscriptions & Credentials	\$1,000
Tenant eligibility and compliance	\$32,000
HOA Dues for 2 Elkhorn units	\$13,309
Tidwell Appeal	\$20,000
Mileage Reimbursement	\$125
Postage & Delivery	\$125
Office Rent	\$12,000
Telephone & Internet/Website expenses	\$2,800
G & A Subtotal	\$84,359
One-Time Expenses	
training, certifications + travel	\$15,000
administrative assistance	\$26,250
fellow, graduate student	\$20,000
furniture & office equipment	\$2,000
One-Time Expenses Subtotal	\$63,250
TOTAL OPERATING EXPENSES	\$480,504

PROGRAM REQUEST

5 B Housing Programs/Contract for Services

1. Create + Preserve Housing: Architect to explore Master Planning YMCA	\$25,000
1. Create + Preserve Housing: Historic preservation architect, Forest Service Park	\$10,000
1. Create + Preserve Housing: ADU incentive	\$50,000
1. Create + Preserve Housing: Lease to Locals	\$906,000
1. Create + Preserve Housing: train program administrator	\$10,000
2. Policy: specialty legal assistance	\$5,000
3. Housing Stability: Eviction prevention	\$30,000

3. Housing Stability: One Stop Shop for housing applicants	\$20,000
3. Housing Stability: Coordinate & facilitate supportive services	\$10,000
3. Housing Stability & 5. Inform, Engage, Collaborate: case worker & partner trainings	\$15,000
3. Housing Stability: rental assistance	\$45,000
5. Inform, Engage, Collaborate	\$86,500
Program Subtotal	\$1,212,500

TOTAL REQUEST	\$1,547,651
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COUNTY DRAFT
HOUSING OPERATING
AND PROGRAM BUDGET SUMMARY

**FY 2023
PROPOSED**

10-Jun-22

OPERATING EXPENSES

Income

Contracts for Services total	\$338,151
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Postage & Delivery		\$125
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One-Time Expenses		
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furniture & office equipment		\$2,000
One-Time Expenses Subtotal		\$63,250
TOTAL OPERATING EXPENSES		\$480,504

PROGRAM EXPENSES	
5 B Housing Programs/Contract for Services	
1. Create + Preserve Housing: ADU incentives	\$41,000
1. Create + Preserve Housing: Lease to Locals	\$406,000
2. Policy: specialty legal assistance	\$2,500
3. Housing Stability: Eviction prevention	\$15,000
3. Housing Stability: One Stop Shop for housing applicants	\$10,000
3. Housing Stability: Coordinate & facilitate supportive services	\$5,000
3. Housing Stability & 5. Inform, Engage, Collaborate: case worker & partner trainings	\$7,500
5. Inform, Engage, Collaborate	\$49,000

Program Subtotal

\$536,000

TOTAL REQUEST

\$684,510

CITY DRAFT
HOUSING OPERATING
AND PROGRAM BUDGET - SUMMARY

FY 2023
PROPOSED

10-Jun-22

OPERATING EXPENSES

Income

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City of Ketchum, benefits contribution	\$38,131
City of Sun Valley	\$0
City of Hailey	\$3,000
CH Administrative Fees	\$5,000
Rental Income, from 2 Elkhorn units	\$18,900
Rental Mgmt Income, Cold Springs Crossing	\$9,085
Rental Income, Lift Tower Lodge (93% occupancy)	\$109,368

Total Revenue **\$480,504**

Expenses

Personel

Salaries	\$185,000
Total Payroll/Benefit Expenses	\$112,134

Total Payroll Expenses **\$297,134**

Lift Tower Lodge

Total LTL On-Site Caretaker Cost	\$2,445
LTL Utilities (Electricity, Gas, Cable, Trash, Sewer)	\$17,160
LTL Snow Removal	\$3,500
LTL Supplies	\$3,500
LTL Maintenance & capital reserve	\$7,656
LTL Other	\$1,500

Lift Tower Lodge Operations Total		\$35,761
General and Administrative		
Ads		\$3,000
Dues & Subscriptions & Credentials		\$1,000
Tenant eligibility and compliance		\$32,000
HOA Dues for 2 Elkhorn units		\$13,309
Tidwell Appeal		\$20,000
Mileage Reimbursement		\$125
Postage & Delivery		\$125
Office Rent		\$12,000
Telephone & Internet/Website expenses		\$2,800
G & A Subtotal		\$84,359
One-Time Expenses		
training, certifications + travel		\$15,000
administrative assistance		\$26,250
fellow, graduate student		\$20,000
furniture & office equipment		\$2,000
One-Time Expenses Subtotal		\$63,250
TOTAL OPERATING EXPENSES		\$480,504

PROGRAM EXPENSES	
5 B Housing Programs/Contract for Services	
1. Create + Preserve Housing: Architect to explore Master Planning YMCA	\$25,000
1. Create + Preserve Housing: Historic preservation architect, Forest Service Park	\$10,000
1. Create + Preserve Housing: ADU incentive	\$9,000
1. Create + Preserve Housing: Lease to Locals	\$500,000
1. Create + Preserve Housing: train program administrator	\$10,000
2. Policy: specialty legal assistance	\$2,500
3. Housing Stability: Eviction prevention	\$15,000
3. Housing Stability: One Stop Shop for housing applicants	\$10,000

3. Housing Stability: Coordinate & facilitate supportive services	\$5,000
3. Housing Stability & 5. Inform, Engage, Collaborate: case worker & partner trainings	\$7,500
3. Housing Stability: rental assistance	\$45,000
5. Inform, Engage, Collaborate	\$37,500
Program Subtotal	\$676,500

TOTAL REQUEST	\$863,141
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HAP Implementation

IMPLEMENTABLE ACTIONS	# of Total Actions in HAP	Implementable Actions
1. Create + Preserve Housing, except: - Action 2. develop preservation incentives - Action 7. homeownership incentives	8	6
2. Update Policy to Promote Housing	13	13
3. Housing Stability, except: - Action 8. physical housing options	8	7
4. Expand + Leverage Resources	10	10
5. Inform, Engage, Collaborate	12	12
TOTAL	51	48

10-YEAR PERFORMANCE MEASURE	Annual Target	Estimated Achievable with Budget
1. Create + Preserve Housing Secure a minimum of 660 housing units in Ketchum over the next 10 years for local, workforce housing	66 housing units secured/deed-restricted	2
Ensure that at least 60% of Ketchum's housing stock is owner- or long-term renteroccupied.	3% housing stock	2%

Ensure that 40% of Ketchum's workforce can live in Ketchum.	3.3% more workers	1%
2. Update Policy to Promote Housing	supports all targets	-
3. Housing Stability		
Prevent displacement and assist 100 households annually who are costburdened, unstably housed or unhoused with supportive services and alternative housing	100 households	50
4. Expand + Leverage Resources		
Secure a minimum \$60M in direct, local investments in the next 10 years, to leverage up to 5x that amount in investments (includes 20% of City funds allocated to projects outside of Ketchum).	\$6,000,000 secured	\$3,863,141
Allocate 20% of City housing funds for significant county-wide actions.	20% of City housing funds	TBD
5. Inform, Engage, Collaborate		
Allocate 20% of City housing funds for significant county-wide actions.	20% of City housing funds	TBD
Through an annual survey, achieve a minimum of 51% satisfaction/public approval of housing action, coordination and results.	51% approval	51%

OPERATING BUDGET, June 10, 2022	Change from FY 2022, \$	Proposed FY 2023	FY 2022	Notes
Total Income	\$234,519	\$480,504	\$245,985	
Total Expenses	\$185,836	\$480,504	\$294,668	
Budget Balance		\$0	-\$48,683	
Income		\$0		
Contract for Service Income				
Blaine County	\$73,510	\$148,510	\$75,000	Blaine County benefits are lower than K SV cut stayed the same
City of Ketchum	\$73,510	\$148,510	\$75,000	
City of Ketchum, benefits contribution	\$38,131	\$38,131	\$0	
City of Sun Valley	-\$5,000	\$0	\$5,000	
City of Hailey	\$3,000	\$3,000	\$3,000	
Contracts for Services (Total)	\$180,151	\$338,151	\$158,000	
CH Administrative Fees	-\$5,000	\$5,000	\$10,000	previously 3% fee for sale of CH, real estate agent charges 1% so cutting this in half
Rental Income, from 2 Elkhorn units	\$0	\$18,900	\$18,900	2 places owned for rental in Elkhorn
Rental Mgmt Income, Cold Springs Crossing	\$0	\$9,085	\$9,085	Management of CSX, 8% of rent. 8 units
Rental Income, Lift Tower Lodge (93% occupancy)	\$59,368	\$109,368	\$50,000	Rent \$700 per single occupancy room, \$800 per couple
Total Revenue	\$234,519	\$480,504	\$245,985	
Expenses				
Payroll Expenses				
Salary; Executive Director	\$23,100	\$120,000	\$96,900	Increase in complexity, scope, responsibility
Salary; Program Administrator & Case Manager	\$21,122	\$65,000	\$43,878	Glassdoor base pay is \$52,000 for Boise
Total Salaries	\$44,222	\$185,000	\$140,778	LTL Manager receiving \$750 Credit towards rent with increased responsibilities
Benefit Expenses	\$71,594	\$112,134	\$40,540	Blaine County at 40% = \$74,000/2=\$37,000. Ketchum at \$37,000+ difference=\$38,131
Medical Insurance, HRA	\$61,100	\$72,100	\$11,000	
Retirement	\$22,089	\$22,089	\$0	
Workers Comp Insurance	-\$3,611	\$389	\$4,000	
Direct Deposit Fees	-\$200	\$0	\$200	
Other - UE, LDI	\$3,404	\$3,404	\$0	
Social security	\$11,470	\$11,470	\$0	
Payroll Taxes	-\$22,657	\$2,683	\$25,340	
Total Payroll/Benefit Expenses	\$71,595	\$112,135	\$40,540	
Total Payroll Expenses	\$75,276	\$297,134	\$221,858	

OPERATING BUDGET	Change from FY 2022, \$	Proposed FY 2023	FY 2022	Notes
Lift Tower Lodge				
Lift Tower Lodge On-Site Caretaker				
Lift Tower Lodge On-Site Caretaker (Salary)	\$0	\$10,500	\$10,500	
LTL On-Site Caretaker (Payroll Taxes)	\$0	\$945	\$945	
Less Rent (On-Site Caretaker)	\$0	-\$9,000	-\$9,000	
Total LTL On-Site Caretaker Cost	\$0	\$2,445	\$2,445	
LTL Utilities (Electricity, Gas, Cable, Trash, Sewer)	\$4,660	\$17,160	\$12,500	increased occupancy from 6 to 14
LTL Snow Removal	\$1,500	\$3,500	\$2,000	
LTL Supplies	\$1,000	\$3,500	\$2,500	
LTL Maintenance & capital reserve	\$7,656	\$7,656	\$0	
LTL Other	\$1,000	\$1,500	\$500	
Lift Tower Lodge Operations Total	\$15,816	\$35,761	\$19,945	
General and Administrative				
Ads	\$2,750	\$3,000	\$250	Ads for LTL RFI/P, submitted notices to newspaper for people to submit their RFQ to redevelop. Ads for housing availability and staff vacancies.
Audit & Bookkeeping & Bank Charges	-\$3,000	\$0	\$3,000	Hailey does bookkeeping. Contract for service.
Computer Expenses	-\$4,250	\$0	\$4,250	N/A
Dues & Subscriptions	-\$2,000	\$1,000	\$3,000	primarily computer dues, switched for professional dues
Tenant Eligibility & Compliance	\$32,000	\$32,000		previously managed by program administrator, quote from Sunny
HOA Dues for 2 Elkhorn units	\$109	\$13,309	\$13,200	2 in Elkhorn
Tidwell Appeal	\$10,000	\$20,000	\$10,000	Ongoing Legal Expense of ~\$20,000 for Tidwell Appeal. Balance is \$17k owed.
Liability Insurance	-\$4,500	\$0	\$4,500	Premium Increase, N/A
Mileage Reimbursement	\$0	\$125	\$125	for driving to meetings, etc.
Postage & Delivery	\$0	\$125	\$125	
Office Rent	\$0	\$12,000	\$12,000	Sawtooth Business Center \$1000/month.
Repairs & Utilities	-\$1,000	\$0	\$1,000	for 2 elkhorn village units
Telephone & Internet/Website expenses	\$1,385	\$2,800	\$1,415	purchase 2 cell phones
G & A Sub-Total		\$84,359	\$52,865	

OPERATING BUDGET		Change from FY 2022, \$	Proposed FY 2023	FY 2022	Notes
One-Time Expenses					
training, certifications + travel		\$15,000	\$15,000	\$0	NAHRO, training property managers, staff, in compliance, tenant screening, mental health first aid, referrals, housing and social service programs
administrative assistance		\$26,250	\$26,250	\$0	\$35/hr for 750 hours (15 hours per week)
fellow, graduate student		\$20,000	\$20,000	\$0	\$25/hr for 740 hours (15/hr/week during semester + 25/hr/week during summer)
furniture & office equipment			\$2,000	\$0	LTL garage, Ketchum office desk, Hailey office desk, filing cabinets, book shelf
	One-Time Sub-Total		\$63,250	\$0	
	Sub-Total Expense		\$480,504	\$294,668	
	Total Expense		\$480,504	\$294,668	
Income less Expenses	Income less Expenses		\$0	-\$48,683	
Fund Balance Transfer	Fund Balance Transfer				
	(incoming) - Capital Reserve				
	Fund Balance Transfer				
	(incoming) - Operating				
	Reserve				
	Fund Balance Transfer				
	(outgoing) - Capital Fund				
	Budget Balance		\$0	-\$48,683	

PROGRAM WISH LIST + REQUESTED FUNDS June 10, 2022			request under separate review or already approved		OPERATIONAL EXPENSES			
GOAL & ACTION	MINIMUM INVESTMENT	IDEAL INVESTMENT	REQUESTED FUNDS, CITY	REQUESTED FUNDS, COUNTY	Staff	TOTAL	IMPLEMENTER different funding recipient	NOTES
Goal 1: Create + Preserve Housing								
Director time (25%)					\$41,459	\$41,459		
2. New Construction	\$0	\$0	\$0	\$0		\$0	-	
architect for Master Planning YMCA	\$25,000	\$25,000	\$25,000	\$0		\$25,000	Housing team/5B Housing/BCHA	
Washington St.	\$1,500,000	\$1,500,000	\$0	\$1,500,000		\$1,500,000	Housing team/5B Housing/BCHA	middle income housing development
3. Preservation: rehabilitation + deed restriction	\$500,000	\$1,500,000	\$0	\$0		\$0	Housing team/5B Housing/BCHA	\$100-150k/home = 10-15 homes
5. Forest Service Park preservation for housing						\$0	Housing team/5B Housing/BCHA	
Architect	\$10,000	\$30,000	\$10,000	\$0		\$10,000	Housing team/5B Housing/BCHA	waiting on scope of work from architect
Improvements	\$600,000	\$800,000	\$0	\$0		\$0	Housing team/5B Housing/BCHA	waiting on scope of work from architect
6. ADU incentives + education	\$9,000	\$109,000	\$9,000	\$41,000		\$50,000	Housing team/5B Housing/BCHA	design competition \$9,000 - \$3,000 for 3 options; incentives \$100,000, \$5,000/ADU=20
7. ownership: downpayment assistance + deed restriction, etc.	\$500,000	\$1,500,000	\$0	\$0		\$0	Housing team/5B Housing/BCHA	\$100-150k/home = 10-15 homes. Or match Idaho Housing Fianance's 7% and add deed restriction ~\$40k/home.
8. Lease to Locals	\$510,000	\$1,000,000	\$500,000	\$406,000		\$906,000	Housing team/5B Housing/BCHA, Landing Locals	Estimate 172 bedrooms unlocked
Administration	\$90,000	\$120,000				\$0		Added capacity for managing the program is \$7500 for first jurisdiction, \$2,500 for each additional.
Marketing	\$20,000	\$20,000				\$0		marketing material design and production (post cards, print ads)
Incentives	\$400,000	\$860,000				\$0		estimate \$5,000 per bedroom
Administer existing and new deed restrictions + Lift Tower Lodge						\$0	\$2,518,639	
train program administrator & property managers on compliance, eligibility	\$5,000	\$10,000	\$10,000			\$10,000	\$224,714	quote from Sunny, compliance specialist
Ongoing compliance on existing and new deed restrictions, application intake and review	\$34,000	\$34,000	\$34,000		\$72,212	\$106,212		included in operations budget
Lift Tower Lodge	\$35,761	\$35,761	\$35,761			\$35,761		included in operations budget
General Administration	\$52,359	\$52,359	\$52,359		\$6,563	\$58,922		included in operations budget
Technical assistance on program development	\$15,000	\$30,000	\$0	\$0	\$0	\$0	Housing team/5B Housing/BCHA, Agnew::Beck	
Goal 1 Total	\$3,669,000	\$6,494,000	\$544,000	\$1,947,000	\$120,234	\$2,701,894		
Goal 2: Update Policy to Promote Housing								
7., 8. 9. Specialty legal assistance	\$0	\$20,000	\$2,500	\$2,500	\$0	\$5,000	Housing team/5B Housing/BCHA	Fair Housing, discrimination, etc, could potentially be shared with tenant mediator in Goal 3

Policy research & draft (Fellow 50%, Director 20%)	\$0	\$0	\$0	\$0	\$34,000	\$34,000	
Goal 2 Total	\$0	\$20,000	\$2,500	\$2,500	\$34,000	\$39,000	
Goal 3: Create + Improve Services to Create Housing Stability							
Director time (20%)					\$33,167	\$33,167	
5. eviction prevention: part-time tenant mediator and legal support, train case workers on mediation and laws	\$25,000	\$100,000	\$15,000	\$15,000	\$0	\$30,000	Housing team/5B Housing/BCHA, BCCF, Legal Aid, Jesse Tree
5. design + implement one-stop shop for housing applicants	\$0	\$20,000	\$10,000	\$10,000	\$36,106	\$56,106	BCHA/5B Housing
5. Coordinate and create supportive services	\$5,000	\$50,000	\$5,000	\$5,000	\$36,106	\$46,106	BCCF, The Advocates, The Alliance
5. case worker and implementation partner trainings on housing and supportive services	\$15,000	\$30,000	\$7,500	\$7,500	\$0	\$15,000	BCCF can implement
5. eviction prevention: emergency rental assistance, improving access: first, last month & security deposit, moving assistance	\$0	\$382,500	\$45,000	\$45,000	\$0	\$90,000	Blaine County Charitable Fund
							last year was 170 households without marketing for average of \$1,100 per household. Adding 1st, last moths rent,security deposit option for \$1,500.
GOAL & ACTION	MINIMUM INVESTMENT	IDEAL INVESTMENT	REQUESTED FUNDS, CITY	REQUESTED FUNDS, COUNTY			IMPLEMENTER different funding recipient
NOTES							
7. physical housing options	-	-	-	-			-
Silver Creek Living	\$123,000	\$0	\$0	\$123,000		\$0	14 bedrooms for emergency/transitional. Emergency housing in the Valley is currently about \$80 per night in a hotel, if they give you a deal. This would be \$50/night.
mobile, prefab, or tiny homes, acquisition or new construction for emergencies	\$100,000	\$1,000,000	\$0	\$0		\$0	5 homes, \$100k each
Goal 3 Total	\$268,000	\$1,582,500	\$82,500	\$205,500	\$105,379	\$225,379	\$180,379
Goal 4: Expand + Leverage Resources							
Director time (15%)					\$24,875	\$24,875	
grant writing + philanthropy coordination	\$20,000	\$20,000	\$20,000	\$0	\$0	\$20,000	
funding database (Fellow 25%)	\$0	\$0	\$0	\$0	\$5,000	\$5,000	Carter or grant-writer
Goal 4 Total	\$20,000	\$20,000	\$20,000	\$0	\$29,875	\$49,875	
Goal 5: Inform, Engage, + Collaborate							
Director time (20%)					\$33,167	\$33,167	
Fellow (25%) + Admin (25%)					\$11,563	\$11,563	
2. materials & design for annual HAP update	\$3,700	\$7,400	\$7,400	\$0		\$7,400	\$3,400 for printing, \$4,000 for design
5. facilitation of quarterly meetings	\$15,000	\$15,000	\$0	\$15,000		\$15,000	includes \$6,000 for travel
6. Housing Department start-up, technical assistance	\$0	\$15,000	\$7,500	\$7,500		\$15,000	AB quote: assistance with regional action plan, establishing organizational structure, development of agreements for collaboration, bi-monthly team meetings

7. implementation partner training	\$0	\$10,000	\$0	\$10,000		\$10,000	Housing team/5B Housing/BCHA	
7. communication strategy + story boards	\$2,500	\$5,000	\$2,500	\$2,500		\$5,000	Housing team/5B Housing/BCHA	
7. community education and outreach - design services	\$20,000	\$20,000	\$10,000	\$10,000		\$20,000	Housing team/5B Housing/BCHA	design services (\$95-125/hr) at 240 hours (
7. rebranding	\$3,000	\$3,000	\$3,000	\$0		\$3,000	Housing team/5B Housing/BCHA	
7. website	\$5,000	\$5,000	\$2,500	\$2,500		\$5,000	Housing team/5B Housing/BCHA	
7. translation services - verbal	\$600	\$600	\$600	\$0		\$600	Housing team/5B Housing/BCHA	\$40/hr, 15 hours per year
7. translation services - written	\$3,000	\$3,000	\$1,500	\$1,500		\$3,000	Housing team/5B Housing/BCHA	HAP was \$1,500, new program material + website
10. Comparable city visits	\$1,500	\$2,500	\$2,500	\$0		\$2,500	Housing team/5B Housing/BCHA	2 places/year, 3 staff
Goal 5 Total	\$54,300	\$86,500	\$37,500	\$49,000	\$44,730	\$131,230	\$99,030	
TOTAL	\$4,011,300	\$8,203,000	\$684,000	\$2,186,500		\$3,147,379		
REQUEST EXCLUDING PREVIOUS REQUESTS		-	\$664,000	\$548,500	\$228,839	\$1,582,379		



Sunny Shaw & Associates

May 24, 2022

Ms. Connelly
City of Ketchum

Thank you, again, for the opportunity to submit a proposal for consulting with the Blaine County Housing Authority/City of Ketchum. This proposal is for monthly full caseload management.

Scope of work:

- Compliance monitoring of 85 deed restricted ownership units
- Screening, as per agency policy requirements, of all applications
- Process all annual recertification including resident interviews (as needed) and engagement in process, verifications, deductions, calculations and orderly action completion
- Meet w/Director or Board Chair 1x per month by visiting office location and be available for questions and conversations throughout month. While at the office location, monitor policy compliance as it relates to file security and documentation. Time onsite is anticipated to be no more than 3 hrs. per visit
- Provide policy review and updates where lacking

Additional component of agreement:

1. It is expressly understood that all work, apart from the monthly visit, will be done remotely
2. Needed documents will be scanned and sent via email by agency staff.
3. The agency understands that on high demand/high certification months work may be assigned to an associate who regularly does work with Sunny Shaw & Associates. All work will have my review and stamp of approval before completion.
4. This agreement does not include general assistance as it relates to customer inquiries and calls.
5. Although the initial term of agreement will be 12 months, it can also be cancelled by either party with a 30-day notice.
6. If services will continue beyond 12 months, please communicate that need 60 days prior to agreement expiration.

The cost for this service will be \$2675/month.

Respectfully submitted,
Sunny Shaw

Ketchum Housing Matters A::B Cost Estimate Facilitation Services I-Jun-22			
	Principal/Facilitator		
	Hours	Cost	TOTAL
		\$175 per hour	
Task 1: Implementation Partners Quarterly Meeting (June 23) Meeting preparation, facilitation and documentation; in-person	12		\$2,100
Task 2: Countywide Leadership Coordination Meeting (June 27) Meeting preparation, facilitation and documentation; virtual	8		\$1,400
Expenses (one RT I-day visit to Ketchum)			\$275
TOTAL			\$3,775

This estimate is good for 60 days.

This estimate presumes City of Ketchum Housing Strategist will provide co-facilitation, logistics coordination and significantly contribute to facilitation materials preparation.