



**VA Caucus Agenda**  
**Wednesday, February 7, 2024, 10am - 2pm**  
**Virginia Housing SW VA Office**  
**105 E. Main Street, Wytheville, VA 24382**

- 1) **Welcome, Special Guest Introductions** - Jamie Gross welcomes Rachel Stevens  
*Christopher Ptomey, Jeanie Barbrow, USDA RD; Amy Schwartz, Jake Naugle, Cliff Millirons, Sam Hanks – VH; Brian Koziol (virtual) – VHA; Mel Jones – VA Tech; Daniel Eades & Jackie Strager – WVU*
  
- 2) **Fahe Membership Business** - Jamie **20-30 minutes**
  - a. Review Previous Minutes and Action Items **pp. 3-8**
  - b. Around the Horn: What's going on – any big events upcoming this year – anniversaries, Homeownership Month activities??
  - c. Executive Report **pp. 9-11**
  - d. Four Corners Working Groups: **Capacity, Narrative, People Money**
  - e. Housing Needs Assessment - Mapping Discussion – Katy Stigers, Jackie Strager  
**pp.12-22** Final Report: <https://www.fahemembers.com/wp-content/uploads/Fahe-Final-Report-WVU-June-2023.pdf>
  
- 3) **Partner Updates**
  - a. Virginia Housing – **10-15 minutes**
    - Pre-Development Loan; S/W VA Projects progress
  - b. USDA-RD – Jeanne Barbrow **10-15 minutes**
  - c. Virginia Housing Alliance – Brian Koziol **10-15 minutes**
  - d. Ballad Collaborative Update – Andy Kegley & Nicholas Bormes **10-15 minutes**

**CAUCUS TIME**

- 4) **Strength in Numbers - Member Interest/Focus Updates** – Traviss Witt **10-20 minutes**
  - a. Organizational Strategies – Draft for Member Input **pp.23-27**
  - b. Workforce Development
  - c. Energy Opportunities – Anticipate funding announcements in March
  
- 5) **Advocacy** **45 minutes**
  - a. State Updates – Maggie Riden
    - VA Caucus Elevator Pitch  
**We, the VA Fahe Caucus are the premier housing professionals supporting the underserved and often overlooked population of Southwest Virginia by building homes and providing housing related services. Recognizing the connection between homes and health by identifying social determinants of health to build stronger communities.**
  - b. State Advocacy Coalition - Amaya
    - Legislative Outreach recap
    - Rural Housing subsidy advocacy
    - Planning on Advocacy Day?
    - Elections and filling vacancies – Maggie
  - c. Federal Updates – Josh

6) **Caucus Discussion** – Members' suggestions on anyone you want to hear from? Any presentations you would be interested to see?

7) **Fahe Updates –**

**20 Minutes**

- a. Board Report – December, 23 - Board Members Andy Kegley, Jake Powell
  - Membership Committee Update
  - Affiliate Partners (i.e.: housing/comm. dev. partners with shared interest in affordable housing) Attached for review **p. 28**
- b. Membership Updates
  - Reporting – QE 12-31-23 status Vonda **p. 29**
  - Membership Info - Training – Jackie Weiss
  - Business Continuity Plans – Status Update – Diedre Kendall, Fahe VISTA
  - Member Disaster Risk Assessment – Jeremy Cornett Fahe VISTA
- c. Communication Comments – Lina Page
- d. REED, Research Evaluation Evidence & Data Cmte - Katy Stigers, Camila Moreno
  - Next initiative: Housing Economic Dev. Impact
  - Office hours: 1<sup>st</sup> Tues. 9:30-11:30am & 3<sup>rd</sup> Thurs. 1-3 pm
  - Standing Committee (REED): 2<sup>nd</sup> Mon. of each month, 1:00-2:15 pm
  - Contacts: [kstigers@fahe.org](mailto:kstigers@fahe.org) [cmoreno@fahe.org](mailto:cmoreno@fahe.org)
- e. Lending –
  - Community Lending
  - JustChoice Lending – Home Sweet Home, open until funds exhausted **p. 30**
- f. Partners for Rural Transformation – Sara Ball

**Upcoming Events**

- **Feb. 20<sup>th</sup> – VHA Housing Advocacy Day ~ St. Paul's Episcopal Church, Richmond - [Register Here](#)**
- **Feb. 22**, 11:30 am ET - Fahe Advocacy Webinar– **Primer on the Federal Budget w/Josh Stewart**
- **Feb. 26-Mar 1** - NeighborWorks Training Institute (NTI) returns to San Francisco, CA
- **April 17-18** – Fahe Spring Retreat/Leadership Symposium, Berea, KY
- **May 6-10**: NeighborWorks America Virtual Training Institute (VTI)
- **June 12** - June Caucus meeting – Location TBD
- **Aug. 26-30**: NTI Pittsburgh, PA
- **Sept. 9-10-11**– Fahe Annual Meeting, Roanoke, VA
- **2024 Virginia Housing Conference** – November 13-15, 2024

Sign up for Fahe's Member Newsletter here: [www.fahemembers.com/signup](http://www.fahemembers.com/signup)

Sign up for Fahe's Blog here: [www.fahe.org/signup](http://www.fahe.org/signup)

VA Caucus page: <https://www.fahemembers.com/state-caucuses/va-member-information/>



**VA Caucus Minutes**  
**Wednesday, Nov. 8, 2023, 10am - pm**  
**People Inc. Office ~ 1173 W Main St, Abingdon, VA 42410**

Name	Attendance	Name	Attendance
Lisa Barton	AppCAA	Nicole Intagliata	Fahe
Rachel Armor	BRHA	Vonda Poynter	Fahe
Jake Powell	CHP	Traviss Witt	Fahe-Virtual
Andy Kegley	Open Door Comm.	Amanda Scalph	Fahe-Virtual
Jordan Stidham	Open Door Comm.	Jackie Weiss	Fahe-Virtual
Bryan Ailey	People, Inc.	James McBride	Fahe-Virtual
Jamie Gross	People, Inc.	Jeremy Cornett	Fahe AC/VISTA-Virtual
Kenny Rodgers	SERCAP	John Niederman	Fahe-Virtual
Christopher Ptomey	Guest	Joshua Stewart	Fahe-Virtual
Elke Hodson	Guest-US DOE(Virtual)	Katy Stigers	Fahe-Virtual
Amy Schwartz	Guest-VH	Lina Page	Fahe-Virtual
Jake Naugle	Guest-VH	Maggie Riden	Fahe-Virtual
Cliff Millirons	Guest-VH	Emily Burleson	PRT-Virtual
Sam Hanks	Guest-VH	Essence Smith	PRT-Virtual
Brian Koziol	Guest-VHA (Virtual)	Savannah Smith	PRT-Intern-Virtual
Amaya Sizer	Fahe	Theresa Mantiplay	PRT-Virtual
Nicholaus Bormes	Fahe	Sara Ball-Virtual	PRT-Virtual

**6 of 6 Members Represented = 100% Attendance!**

- 1) **Welcome, Special Guest Introductions** - Jamie Gross, Vonda Poynter  
 Christopher Ptomey, Jeanie Barbrow, USDA RD; Amy Schwartz, Jake Naugle,  
 Cliff Millirons, Sam Hanks – VH; Brian Koziol (virtual) – VHA; Elke Hodson, Ph.D., US  
 DOE (virtual)
- 2) **Fahe Membership Business** - Jamie
  - a. Review Previous Minutes and Action Items  
 Motion made to pass minutes, seconded. Passed unanimously.
  - b. Around the Horn: What do you need most from Fahe? (funding opportunities, technical assistance, training, additional support, etc.)  
 Would like to be able to build houses, people cap out at 80% limited income is not enough to build a new house. Construction loans that are affordable and flexible. Institutional memory/history of organization. People are retiring, a way to hand down institutional knowledge and carry it on. Want JustChoice to be an option for community land trust projects. Close to 100 in the next few years and has only one lender available.
  - c. Annual Meeting Reflections ...  
 Great meeting – favorite one ever been to, felt like a movement, real connections being made and real momentum being built. Enjoyed Luke Schaeffer and his book, the way he talked about social infrastructure. Enjoyed seeing Andy's video.
  - d. Four Corners Working Groups  
 Some people from VA have signed up, there is still time for others to sign up by emailing Vonda. Financing is the lynchpin, there aren't any units to be able to use for housing.
  - e. Executive Report – Vonda  
 The housing crisis. What tools are we looking at in our toolbox? Land trust, adding to housing stock. HUD is really pushing manufactured homes due to price. But it's not less expensive and need something to serve families well long-term. At OFN Conference,

geared towards CDFI, the Greenhouse Gas Reduction Fund was what everyone was talking about. People are having trouble filling and maintaining positions. Planning to go over that further at the Spring Retreat and some HR strategies.

Jamie Gross presented VA caucus award to Andy Kegley for 30 years of service.

### 3) Partner Updates

#### a. Virginia Housing – Sam Hanks, Cliff Millirons

- Sam Hanks – Community Land trust anticipating will come to rural areas. Rates are not helping to get people into homes. Doing more with FHA because allows higher debt ratio which is helping some people get in. 502 Direct loans are most popular way to get people homes. Manufactured homes – 60-90 day build time on those right now.
- Jake Naugle introduced himself.
- Amy Schwartz – how deal with resale of manufactured homes, RD has a pilot program that will fund '06 and newer manufactured homes or FHA as well, '76 and newer if pass foundation inspection which they figure that price in. Rate is the same as new construction.
- Clif Millirons – A larger project can get up to 200k, paid back from construction loans, etc. Really tough to get grant money. Pre-development loan is only for multiple family. To encourage the developer to step up to the plate.

#### b. USDA-RD –

- Vonda – Hoping the budget is going to pass to have funding available. VA has a pilot program within their foreclosures, there is the ability for a rural housing pilot project, asked Jeanne to do some checking. USDA RD properties sell at discounted price, VA RD fix it up, and sell it to get some houses back in the market.

#### c. Virginia Housing Alliance – Brian Koziol

- Draft legislative agenda for the year, expand Virginia Housing Trust Fund to 150M per year. Also working on establishing a state funded rental housing voucher program, not calling it that, rebranded it to 5000 Families pilot program – will provide ongoing rental assistance to low-income households with children. Asking for 50M/year to assist households, 100M total. 5000families.com is the site. Also looking at legislation that would allow jurisdictions to do their own right of first refusal program, to preserve affordable housing, to include mobile home parks. Working on another bill that ensures that affordable housing properties are accurately accessed using income approach. Working with BROAD coalition to expand Medicaid for high need support, provide housing and employment supportive services for Medicaid participants. Currently at 80M/year, asking for 130M/year. Adopt less restrictive zoning, working it's way through VA Housing Coalition. Supportive of work Fahe is doing.

#### d. Ballad Collaborative Update – Andy Kegley & Nicholaus Bormes

- Grant funds from Ballad Health, they receive reporting, pathways, and more from Fahe. If need health care assistance, can refer to Ballad and vice versa. Have been approved for year 3 with Ballad, 200k grant from Ballad. Individually for members, 22,500 for each. Would like more money to be able to create and support projects on a large scale. Maintaining quality reporting, been praised for quality.
- Monthly working group meetings, bringing in guest speakers. If anyone is interested, let Nicholaus know.
- Trauma-Informed health care training coming up again next year, probably end of January. Same classes but taught by different instructors.

## CAUCUS TIME

### 4) Strength in Numbers - Member Interest/Focus Updates – Traviss Witt

#### a. Workforce Development

- We are listening, hear the concerns about internal and external employees contractors, working on putting together things that could help. Poaching people from other places?

#### b. Dept. of Energy opportunities summary

- Greenhouse Gas Reduction Fund – too much money to ignore, going directly to CDFIs. 27B in the fund, most credits will be stackable.
- Opioid Settlement Funds – has anyone had success with accessing? Smith County local government has been able to partner to use it. Long -term money, 28 years of funding available.
- c. EV Partnership Opportunity
  - Approached by EVNoire – a nation level advocacy awareness research implementation group for electric vehicles. Alex Bad, current grant called EVHybridNoire – ends in January – can pay for educational and event expenses if there is something about electric vehicles educational piece.
- d. Broadband
  - Going to be implementing digital equity piece next year, specifically mentions public housing authorities and nonprofits. Might be reaching out on behalf of Fahe.
- e. US Dept. of Energy – Elke Hodson
  - Inflation Reduction Act's Tax Credits, cashback with the new provisions. Unleashing Investments in Clean Energy through the Inflation Reduction Act's Tax Credits – not competitively awarded. Inflation Reduction Act is largest Climate & clean energy investment in US History – available for everyone, extra benefits for underserved populations. Elective pay allows tax-exempt entities to receive a cash payment from the IRRS for eligible clean energy investments. Cash for clean energy equal to the full value of clean energy tax credits. Can be combined with DOE grants and loans with some limitations. 12 of the Inflation Reduction Act clean energy tax credits are eligible for elective pay. Bonuses in clean electricity for energy communities, domestic content, and wind and solar. Opportunities for community solar. Can get up to 70% of project back in tax credit. IRS will be issuing more guidance later this year. Pre-filing form is not yet available.

## 5) Advocacy

- a. State Updates – Maggie Riden
    - State Advocacy Committee
      - We, the VA Fahe Caucus are the premier housing professionals supporting the underserved and often overlooked population of Southwest Virginia by building homes and providing housing related services. Recognizing the connection between homes and health by identifying social determinants of health to build stronger communities.**
  - b. State Advocacy Coalition - Amaya **pp. 12-15**
    - Legislative ask – amount, use, timeline
      - One pager – added content added savings so by 2030, both programs are conducted the same. Energy is a widespread concern for VA.
      - Multiple Family ask – to include updates to program, forgivable interest on project loans. If have any input, reach out in the next couple of weeks.
      - Identified some potentials – reach out to both parties in both chambers, identify someone we can reach out to on Senate side, reach out to senators.
      - Trying to connect with Morefield, other key legislators in the next month and a half.
      - Have resources to guide conversations with legislators at every stage if desired.
    - AHTF
    - State and Local ARPA
      - Local jurisdictions some got a little more relaxed list on how they can spend them if they haven't already spent them. Might ask if there is money left.
- <https://www.route-fifty.com/finance/2023/08/treasury-expands-uses-arpa-funding/389838/>
- Plan for Education
    - Developing Advocacy toolkit – making process more accessible. Subdivisions are different than individual houses. Pre-development cost and development fees.

- HFH VA – status of their legislative request - Haven't heard anything as of yet.

c. Federal Updates – Josh

- Appropriations process – House is pushing for CR to move to January, Senate wants Christmas. HUD numbers look good compared to what they were, AG is looking rough especially looking at 502 direct. The 502 direct interest rate proposed to change from 1% to 2%, they have verbal assurances that will be dropped out of the language of the bill.

CRA Reform – In the proposed rule final stage, news isn't great. Fahe made comments that were included but not addressed about loopholes for banks at the expense of the kind of investments that members use. Initial review looks like if you are not already being served by banks by CRA investment, you are likely to continue to not be served. If you have historically been served by CRA, you may need to anticipate having less CRA investment than before or need to shop around more. Very favorable to bankers in most places and artificially deflates the size of banks, decreases the amount of CRA investments that are going to be made. Did increase weight that community developments have, so that is positive. Several changes to the areas in which banks are held to CRA assessments.

## 6) Caucus Discussion – Around the Square

Susan Dewey retiring from Virginia Housing after 25 years

Update – Had hired a recruiting company to search nationwide, they've started the job description to put out to advertise for that. Susan will be stepping down December 31<sup>st</sup>. They do not anticipate having anything done until 4 months out from the first of the year so Chief of Operations Janet Wiglesworth will be stepping in temporarily.

## 7) Fahe Updates –

a. Board Report - Board Members Andy Kegley, Jake Powell

Work ongoing with strategic plan. Board meeting coming up. Executive Committee meeting in October – took care of board resolutions, approved the audit through finance committee, clean audit.

- Membership Committee Update

Affiliate Partners (i.e.: housing/comm. dev. partners with shared interest in affordable housing), Associate Member (all still pending)

- Membership Committee is board committee, there are several board members on it. Have been extremely helpful, did initial survey on working groups. Putting info into a report going to share.
- Affiliate Partners would not get membership benefits such as voting. For organizations that might be of interest to members like a developer or someone who wants to work better with members. May also come with a fee like members. In the works right now, will not have full access to everything because they are not partners. Will come to all the state caucuses in February and will hopefully will be an option by next membership time.

b. Membership Updates

- Reporting – QE 9-30-23 status Vonda

- Reporting for this quarter was down, 65.5%, definitely lower than normal, usually around 85%. It's been busy. 66.7% for VA – to be a member, you have to report as well. Can enter last quarters numbers when report in December so that the numbers are captured.

- Membership Renewals; Training – Jackie Weiss

- NeighborWorks is doing NTI in San Francisco this year, have a small amount of funds to support participation. If register under Fahe umbrella, eligible for free hotel for the week. Around \$200 to reimburse if you go and send receipt and certificate of completion. Registration for week of courses is \$1200-1500. That is a discounted price.
- Two other options – virtual training in May, registration will open around time NTI

happens.

- In August, there will be NTI in Pittsburgh, PA. Let Jackie know if you have someone you would like to send to any of those.
- Business Continuity Plans – Status Update – *Diedre Kendall, Fahe VISTA*
- Moved on to other states, done with VA but if still want to participate, let Diedre know.
  - If members have any information that they would like information added to the Disaster Recovery webpage, let Diedre know as well. Link will be available in Monday email.

c. Communication Comments – Lina Page

Need more resources to meet need. Working on building reputation and influence. Working on expanding the circle of influence and awareness and visibility through public relations. At Luke Schaeffer's university, they have a publication, so Fahe and Jim provided quotes in an article in the publication that was new and different. Was on call with Mortgage Banker magazine, national lenders but you never know who might want to partner with Fahe. Plan over the next several months to share stories with Fahe and Lina in particular. Will be reaching out to discuss stories, would like any press releases that the members get. Invites members to join narrative working group if believe in the impact of words.

d. REED, Research Evaluation Evidence & Data Cmte - Katy Stigers, Camila Moreno

- Your data is an asset and assets are money. Can absolutely leverage reports and data like you do dollars. Creating a space where whoever is interested in research and reporting, talk about data challenges, what can be done with the data, how to visualize it, with support from Katy and Camila. Have helped make maps, decide what type of tool is needed, what data sources to use, prioritize projects. Send someone to the REED committee, meet monthly, have speakers.
- Mel Jones did a gap analysis last year, have worked with her to improve data opportunities with geographic techniques to create units of analysis. Can't get granular enough because the area's population is too small for accurate data. Mel is working on is seeing if we can't put together better maps/data. Going to send them out, ask if they are better or worse, and really refine the maps and data, make sure they make sense. Going to send emails to invite to meetings, if you cannot come, send a delegate that has authority to agree if something makes sense.

Office hours: 1<sup>st</sup> Tues. 9:30-11:30am & 3<sup>rd</sup> Thurs. 1-3 pm

Standing Committee (REED): 2<sup>nd</sup> Mon. of each month, 1:00-2:15

pm Contacts: [kstigers@fahe.org](mailto:kstigers@fahe.org) [cmoreno@fahe.org](mailto:cmoreno@fahe.org)

e. Lending – JustChoice Lending & Community Lending

Home Sweet Home is a deferred second mortgage, no income restrictions. Have some additional funds but last time, ran out pretty quickly. Give them a call if interested.

f. Partners for Rural Transformation – Sara Ball

- PRT is a coalition of 6 CDFIs and national members and have gotten a lot of questions about who and what PRT is. PRT is built on Fahe's model, they are member organizations that work together as a coalition. Your work goes up to be a collective voice. PRT takes that regional level through Jim and goes to national level. Persistent impoverished places pull the rest of the world down, so it affects even those places that aren't consistently impoverished. If money flows easily into rural areas, it flows easily into urban.
- 10-20-30 language increases the number of resources that come into our area, PRT was part of that being implemented, still working to get it into other places as well.
- Fahe and PRT were able to get language into executive order by President Biden,

- the relationship with various folks in the White House and other places of power.
- Everything Else story map has a great piece on open door community – lifts voices of people and communities.
  - For Communications inquiries: [essence@pfrt.org](mailto:essence@pfrt.org)  
For Research/Advocacy inquiries: [emily@pfrt.org](mailto:emily@pfrt.org)  
For Fund Development/Lending inquiries: [sarab@pfrt.org](mailto:sarab@pfrt.org)  
For general inquiries: [prt@pfrt.org](mailto:prt@pfrt.org)

Everything Else Story Map Website: <https://storiesofruralamerica.com/>

PRT's Website: <https://www.ruraltransformation.org/>

Connect with us on Twitter: <https://twitter.com/PfRTorg>

Meeting adjourned at 2:02 pm ET.

### **Upcoming Events**

- **Nov. 15** – 1 pm ET (12 pm Central) – Lunch & Learn Member REED Cmte **with Dr. Jessica Mahone** researcher + data analyst, and director at UNC-Chapel Hill's Center for Innovation and Sustainability in Local Media  
<https://us02web.zoom.us/j/82094251333?pwd=TKYzRDJnZ01JMmRvMUhKZ09mU0JjUT09>
- **Nov. 15-17** – VA Governor's Housing Conference
- **Nov. 21 – 11 am** – VA Advocacy Coalition Call
- **Dec. 6-7** – Fahe Board Meeting
- **Dec. 19 – 11 am** – VA Advocacy Coalition Call
- **Feb.** date TBD – VA Caucus Meeting
- **Feb. 22** – 10 am ET -**Fahe Advocacy Webinar**
- **Feb. 26-Mar 1** - NeighborWorks Training Institute (NTI) returns to San Francisco, CA
- **April** date TBD – Fahe Spring Retreat/Leadership Symposium, Berea, KY
- **May 6-10:** NeighborWorks America Virtual Training Institute (VTI)
- **Aug. 26-30:** NTI Pittsburgh, PA
- **Sept.** date TBD – Fahe Annual Meeting

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VA Caucus Page on Member website:





Memo

To: Fahe Members

From: Jim King, CEO

Sara Morgan, President

Re: Executive report

Date: January 30, 2024

This is the first six months for FY2024 report on the organization from President Sara Morgan and CEO Jim King. Our vision is for Appalachia to be a place of growth, opportunity, and hope so that all people fulfill their potential and have a high quality of life. A vision that will take a generation of work. Our job over the next 10 years is to build the foundation capable of meeting that vision. All foundations have corners, necessary to building structures that will last. Our corners of Money, Capacity, Narrative and People also serve as the frame to our next strategic plan. We are organizing working groups of the Members around each of the corners to give greater clarity and direction to the strategic plan so that Members and their communities are at the center.

**Money. Engage funders to bring significant new and increased investments to the region while also analyzing and advocating for policy reform to support the flow of more, place-sensitive resources to benefit Appalachia.**

- Fahe joined several applications as part of the Inflation Reduction Act's Greenhouse Gas Reduction Fund.
- Fahe was selected via RFP from Kentucky Housing Corporation to serve as the Regional Implementation Agency for the Community Development Block Grant Disaster Recovery FY2022 Funding of \$298 million coming from HUD to the state in response to the East KY Flooding of 2022. We are working with the KY Governor's office on an administrative contract to manage both the High Ground Communities and the Team KY dollars for the Commonwealth.
- Under the leadership of Fahe's SVP of Advocacy, Maggie Ridden and SVP of Membership Vonda Poynter, Fahe's TN coalition is being awarded \$10M in ARPA funding to support the development of workforce housing which is much needed in the state. Building on these successes, staff will expand their efforts in the future to the states of Virginia, West Virginia and Alabama.
- With PRT we have been making progress with the Heron Foundation to create a plan to get significant philanthropic resources in the tens of millions to Appalachia and other persistently poor regions over the next several years.

**Expanding Capacity. Expand capacity to meet the growing needs in our communities.**

- Fahe's 2023 Annual Meeting was held with great attendance from members, USDA, State Housing Finance Agencies, ARC, etc. Sessions highlighted members responding to leaders such as Luke Shaefer.

- We launched working groups around each of the four corners identified in the 2024-2028 strategic plan and Members self-selected to participate in these working groups advising on the implementation direction.
- There is a real vacuum of leadership in the community development field on appropriations strategy. Fahe's advocacy team has begun engaging and pushing on national coalitions and groups to not only address the near term of "regular order" appropriations work, but to think longer term to the end of the year and work towards that goal.
- The Kentucky Caucus has formed solid working relationships with several major state nonprofit players, including the Louisville Urban League, KY Habitat for Humanity, and the KY Affordable Housing Coalition. Centering rural issues within this coalition is a work in progress, but LUL and KY Habitat lent their active support to the Rural Housing Trust Fund effort in the 2023 session.
- The AL Caucus continues to maintain a working relationship with LIHCA to uplift the HTF.
- Members of the VA Caucus are exploring collaborating with organizations like the SELC and VPLC to respond to (with litigation) the Younkin administration pulling out of RGGI and eliminating a substantial funding source for weatherization and residential energy work.
- Tennessee Members had Rep. Rose join their Making Housing Work for Working Families Event.
- In West Virginia, we have engaged with the WV Center for Budget and Policy, namely Seth Distefano, their main legislative person who expressed that he is glad someone is working on affordable housing issues in WV because there isn't much of a presence there.

**Building a New Narrative. Work to achieve a collective brand and voice capable of building a new narrative that uplifts the culture, worth, and importance of Appalachia to the country's overall success.**

- The Fahe Membership has an authentic community presence and that does allow the opportunity to elevate the voices of community.
- During the 1st six months we utilized a number of meetings and presentations to push the Fahe brand, as a leading voice on Appalachia, Strength in Numbers as a replicable approach, persistent poverty and leading change.
- We released the Housing Needs in Appalachia Study in July with a webinar. Met with Alanna McCargo of Ginnie Mae. Presented with the National Association of Business Economists.
- We continue to build on the Concrete solutions conversations, receiving commitments from USDA and the Heron Foundation to work on a Theory of Change that elevates our voices of experience to solutions. And we started the conversation to add academics, Luke Shafer and Katharine Edin to this group.

**Strength in Numbers. Invest time and energy in trusted relationships across the region, growing our Strength in Numbers to create transformational impact that builds Thriving Appalachian Communities.** We have long said that our identity is "Strength in Numbers". You have heard us repeat "if you want to go fast, go alone. If you want to go far, to do something big, go with friends."

Staff have worked hard on state level advocacy and coalition building. Our success in TN was driven by forming a coalition of over 100 organizations. In KY around flood relief work and some statewide work, our organizing did result in an increase of \$20 million in the Trust fund and dedicated resources for flood work.

The Annual meeting was a success, we had over 80% members present for the event. Chrystal Cornelius from Oweesta got us started with inspiring words that helped members see the connection to another part of the country. Luke Shafer enlightened and validated our understanding of deeply disadvantaged places of which Appalachia is one. We were able to highlight the work and thought leadership of the members in response to these speakers and showcase how the Strategic plan frames our work together.

Fahe in partnership with PRT has developed a Rural Equity Framework for which we have identified a set of principles and practices that inform our work: **Framework** harnesses the insights from ongoing analysis of what is possible to influence an important body of work that is DIFFERENT than what anyone else has done before because it builds on a shared understanding of the interrelatedness of racial, spatial, and economic inequities in places of deep poverty.

We believe policy makers, investors and philanthropists will benefit from the Framework as they consider how to make a greater difference in rural persistent poverty areas.

The last part of the Annual meeting with USDA, Luke Shaefer, Christie Cade, (policy makers, investors, philanthropists, academia and practitioners) was to conclude the event and direct us to a next step, to have Fahe host a conveying on the Framework.

As we head into the second half of FY2024, we will have strong strategic plan, backed by a well thought out Theory of Change. Our momentum is strong and we are feeling confident in our ability to make good progress on the goals and vision before us. By working together, we have before us the ability to change the narrative for Appalachia and the people and places that are affected by persistent poverty.

# FAHE Progress Update

April 2023 - Original

January 2024 – Final Update

Jackie Strager, West Virginia University

## Project Description

- Housing Metrics for Central Appalachia, Appalachian Alabama
- Exploratory spatial data analysis for Census tracts
- Issue: Census socio-economic variable estimates (from ACS) are not reliable for non-urban tracts
- **Goal: Group census tracts together based on shared housing-related characteristics**
- **Result: Census tract-based clusters (by state) for further analysis**
- Approach:
  - Develop tract-based socio-economic variables (ACS, GIS)
  - Use spatially constrained multivariate clustering to group tracts of interest
  - Present final results as maps, tables

## Clustering work

- Main task: Clustering/grouping census tracts
- Approach: **Spatially constrained multivariate clustering** (ArcGIS Pro)
- Details:
  - **Spatially constrained**: Location matters (clusters will be contiguous)
  - **Multivariate**: Groups tracts based on values for selected variables
  - All variables for clustering must be numeric or (0,1)
  - 35 different variables quantified for each tract (10 used in final clustering)
  - Variables are normalized

## Tract Variables

N=35 variables considered

Variables quantified for each tract

Data sources:

American Community Survey, GIS analysis

**Highlighted variables (n=10)** used for final clustering (not dependent on tract size/population, not highly correlated with one another)

HH	total households
POP25	population over age 25
HUNITS	total housing units
OCCU	occupied housing units
OWNU	owner occupied housing units
RENTU	renter occupied housing units
<b>HHINC</b>	<b>median household income</b>
HHINC_O	median household income, owners
HHINC_R	median household income, renters
<b>MEDDOL</b>	<b>median dollars (value)</b>
MEDGRO	median (dollars) gross rent
<b>MEDM</b>	<b>median (dollars) with mortgage</b>
MEDNOM	median (dollars) without mortgage
WITHM30	30.0 to 34.9 percent_WithM
WITHM35	35.0 percent or more_WithM
<b>PCBM</b>	<b>% Cost Burden Owner with a mortgage</b>
PCB30	30.0 to 34.9 percent_Rent
PCB35	35.0 percent or more_Rent
<b>PCBR</b>	<b>% Cost Burden Renter</b>
NLCD_PFOR	Percent (0-100) forested in tract, from 2019 NLCD forested land cover categories
NLCD_PDEV	Percent (0-100) developed in tract, from 2019 NLCD developed land cover categories
NLCD_PWAT	Percent (0-100) water in tract, from 2019 NLCD category 11 open water only
UA_PERC	Percent (0-100) urbanized area in tract, from 2010 Census urbanized areas
ACSPop_19	Estimated population in tract, 2019 ACS 5-year estimates
AreaSqMi	Area of tract in square miles (calculated by GIS)
<b>PopDen_19</b>	<b>Estimated population density (2019 population divided by area in sq miles)</b>
Q75_UA	0 or 1. Is tract over 75 <sup>th</sup> percentile in urbanized area relative to other tracts
Q75_NLCDDE	0 or 1. Is tract over 75 <sup>th</sup> percentile in developed area relative to other tracts
Q75_PopDen	0 or 1. Is tract over 75 <sup>th</sup> percentile in population density relative to other tracts
<b>PUBLIC_PCT</b>	<b>Percent (0-100) public land in the tract as defined by US CBI</b>
COMMUTERS	number of commuters (ACS journey to work data 2014-2019)
PCT_COMM90	percent of commuters traveling over 90 minutes to work (ACS 2014-2019)
<b>PCT_COMM60</b>	<b>percent of commuters traveling over 60 minutes to work (ACS 2014-2019)</b>
PCT_HHRENT	percent of households renting (calculated by WVU for tracts with data) based on households renting divided by total occupied households
<b>PCT_HHOCC</b>	<b>percent of households occupied (calculated by WVU for tracts with data), based on total occupied households divided by total households</b>

## Variable correlation results

- Simple correlation matrix calculated for all potential variables
- Eliminated variables with high correlation from clustering

	HHINC	HHINC_O	HHINC_R	MEDDOL	MEDGRO	MEDM	MedNoM	PCBM	PCBR	NLCD_PFOR	NLCD_PDEV	NLCD_PWAT	UA_PERC	PopDen_19	PUBLIC_PCT	PCT_COM M60	PCT_HHR ENT	PCT_HHO CC
HHINC	1.00																	
HHINC_O	0.87	1.00																
HHINC_R	0.68	0.48	1.00															
MEDDOL	0.51	0.54	0.39	1.00														
MEDGRO	0.34	0.26	0.40	0.30	1.00													
MEDM	0.36	0.42	0.24	0.58	0.20	1.00												
MedNoM	0.23	0.36	0.14	0.40	0.21	0.43	1.00											
PCBM	-0.27	-0.31	-0.17	-0.18	-0.06	-0.03	-0.06	1.00										
PCBR	-0.28	-0.17	-0.51	-0.25	0.03	-0.15	-0.05	0.12	1.00									
NLCD_PFOR	-0.21	-0.33	-0.20	-0.38	-0.14	-0.23	-0.31	0.18	0.11	1.00								
NLCD_PDEV	-0.02	0.18	0.03	0.17	0.14	0.07	0.33	-0.07	0.04	-0.56	1.00							
NLCD_PWAT	0.12	0.13	0.08	0.17	0.05	0.14	0.13	-0.06	-0.07	-0.25	0.11	1.00						
UA_PERC	-0.03	0.14	0.02	0.10	0.12	0.01	0.32	-0.06	0.05	-0.47	0.94	0.10	1.00					
PopDen_19	-0.01	0.18	0.01	0.16	0.12	0.06	0.29	-0.04	0.04	-0.45	0.92	0.07	0.87	1.00				
PUBLIC_PCT	0.10	0.06	0.08	0.14	-0.06	0.00	-0.08	0.03	-0.08	0.27	-0.14	0.10	-0.09	-0.10	1.00			
PCT_COMM60	-0.10	-0.18	-0.06	-0.13	-0.10	-0.16	-0.14	0.01	-0.09	0.28	-0.29	-0.07	-0.24	-0.22	-0.02	1.00		
PCT_HHRENT	-0.33	0.03	-0.23	-0.02	-0.07	0.02	0.27	-0.03	0.12	-0.28	0.50	-0.01	0.47	0.48	-0.13	-0.24	1.00	
PCT_HHOCC	-0.06	0.04	-0.06	-0.06	0.08	0.08	0.12	-0.01	0.04	-0.17	0.10	-0.20	0.00	0.06	-0.25	-0.03	0.15	1.00

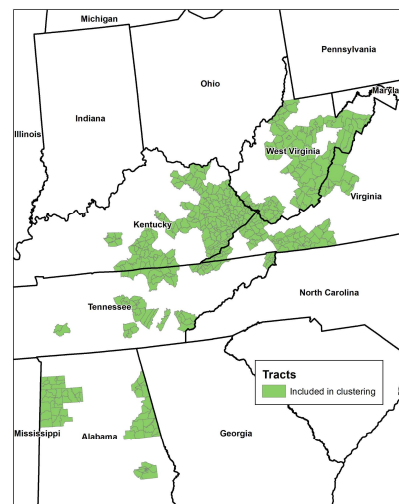
Highest correlations:

- Household income and household income owner occupied (use household income only)
- Population density, urban area %, NLCD developed area % (use population density only)

## Study area: Tracts for clustering

- For ARC counties in 5 states
- Excluded tracts within metropolitan statistical areas or micropolitan statistical areas
- Clustering performed by state

State	# Tracts (total in ARC)	# Tracts included	# Contiguous Groups of Tracts
Alabama	728	64	3
Kentucky	318	170	3
Tennessee	646	59	7
Virginia	185	76	3
West Virginia	484	100	2

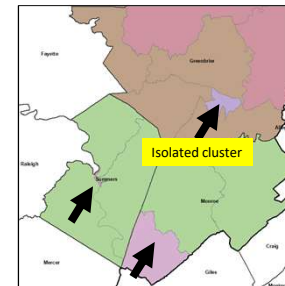


## Clustering methods: Spatially constrained multivariate clustering

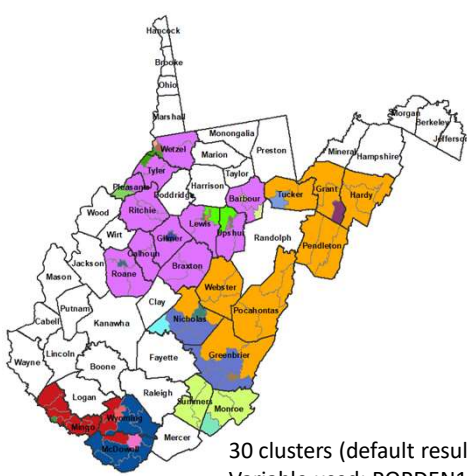
- Clustering model iterations – by state
  1. Perform clustering with single variable (n=10) at a time, examine  $R^2$  values
  2. Perform clustering with two variables (variables w/highest  $R^2$  values)
  3. Perform clustering with three variables (highest  $R^2$  values)
  4. Evaluate cluster results using  $R^2$  values (variable contribution) and F-statistic graphs (optimal # of clusters)
  5. For each state, determine best single cluster model = final clusters
  6. Note: Most runs end up with default n=30 clusters
- For final clusters – adjustments:
  - Eliminate single-tract (isolated) clusters by merging with adjacent clusters
  - See guidelines (next slide)

## Final cluster adjustment (merge)

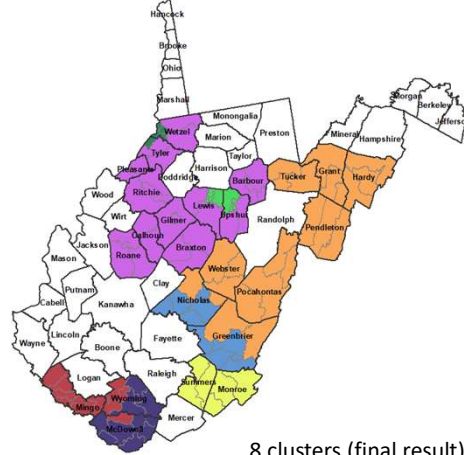
- Goal: Eliminate single-tract (isolated) clusters
- Guidelines:
  - Use of ancillary data layers: CDPs, census incorporated places, census primary/secondary routes
  - Is isolated cluster surrounded by another larger cluster? If so, merge
  - Is isolated cluster located along a primary/secondary highway? If so, merge with adjacent cluster on the same route
  - Is isolated cluster adjacent to a mapped CDP or census place? If so, merge with cluster adjacent to the same mapped place
  - If none of the above applies, merge isolated cluster with adjacent cluster with longest shared border
  - Did not take into account cluster geographic size or population (but could!)



## Cluster results: WV (before and after merge)



30 clusters (default result)  
Variable used: POPDEN19  
R2 = 0.999



8 clusters (final result)  
after merging to eliminate  
isolated clusters (single tract)

## Cluster results: AL

**Final model for clustering:**

POPDEN19 (r2 = .906)

PUBLICPCT (r2 = .917)

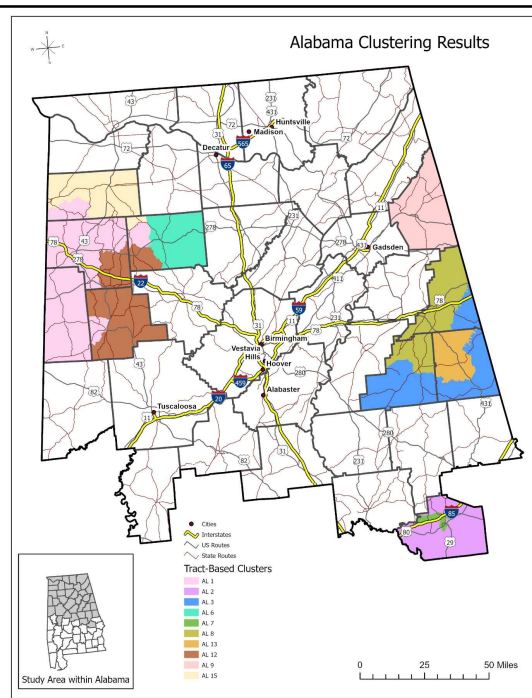
PCTCOMM60 (r2 = .767)

PCTHHOCC (r2 = .829)

Final # original clusters: 17

Final # clusters after merging: 10

Smallest cluster (by # tracts) (Randolph County) has n=2 tracts





## Cluster results: AL

**Final model for clustering:**

POPDEN19 (r2 = .906)

PUBLICPCT (r2 = .917)

PCTCOMM60 (r2 = .767)

PCTHHOCC (r2 = .829)

Final # original clusters: 17

Final # clusters after merging: 10

Cluster	Tracts (N)	Households (N)	Housing Units (N)	ACS Population 2019 (Estimate)	Total Area (mi2)
AL 1	12	18,933	23,593	45,980	1413.74
AL 2	7	5,216	6,500	11,541	571.81
AL 3	8	10,628	13,266	27,487	833.05
AL 6	4	5,537	8,607	13,440	430.92
AL 7	5	2,258	3,796	7,167	41.40
AL 8	4	5,947	7,413	15,984	645.28
AL 9	6	10,737	16,579	25,903	599.98
AL 12	7	8,819	10,985	22,037	843.81
AL 13	2	3,005	5,061	7,429	272.82
AL 15	9	12,006	15,181	34,038	568.31

Smallest cluster (by # tracts) (Randolph County) has n=2 tracts

Final Clusters

## Cluster results: KY

**Final model for clustering:**

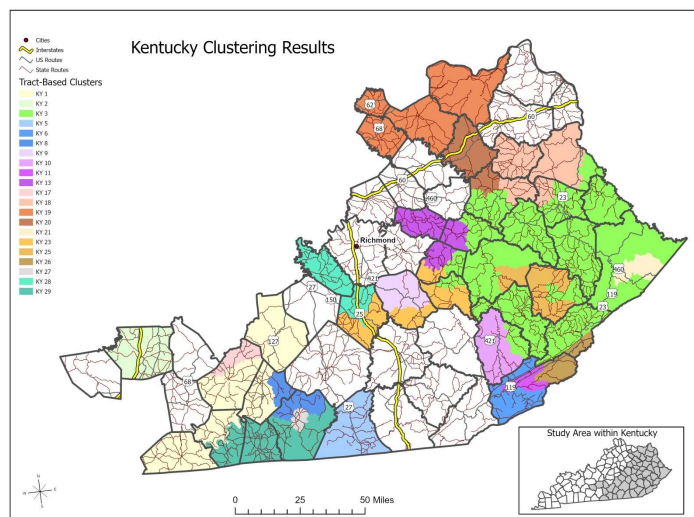
POPDEN19 (r2 = .967)

PUBLICPCT (r2 = .951)

Final # original clusters: 30

Final # clusters after merging: 21

Several clusters with only 2 tracts



Final Clusters

## Cluster results: KY

**Final model for clustering:**

POPDEN19 (r2 = .967)

PUBLICPCT (r2 = .951)

Final # original clusters: 30

Final # clusters after merging: 21

Several clusters with only 2 tracts

Cluster	Tracts (N)	Households (N)	Housing Units (N)	ACS Population 2019 (Estimate)	Total Area (mi2)
KY 1	19	23,335	29,269	60,393	1,436.82
KY 2	5	7,351	9,077	18,729	417.85
KY 3	69	89,645	108,621	219,695	3,492.12
KY 5	4	6,052	7,523	17,465	430.95
KY 6	4	4,245	5,296	10,246	257.37
KY 8	2	3,285	5,920	7,908	222.39
KY 9	2	3,322	4,170	8,261	236.85
KY 10	2	2,968	4,004	7,637	321.41
KY 11	4	4,330	4,982	10,628	88.21
KY 13	4	8,080	9,870	20,498	369.65
KY 17	2	1,394	1,778	3,610	113.89
KY 18	8	9,395	12,185	25,427	758.21
KY 19	11	14,774	17,646	37,206	1,143.63
KY 20	5	9,352	11,311	26,286	374.94
KY 21	2	3,199	3,958	7,116	133.21
KY 23	5	6,116	7,190	15,201	514.81
KY 25	4	4,647	5,427	10,932	348.55
KY 26	4	3,007	3,970	6,807	173.07
KY 27	2	3,940	4,806	9,407	43.31
KY 28	6	10,700	12,429	27,574	358.49
KY 29	6	7,367	9,672	19,630	657.15

Final Clusters

## Cluster results: TN

**Final model for clustering:**

POPDEN19 (r2 = .952)

PUBLICPCT (r2 = .880)

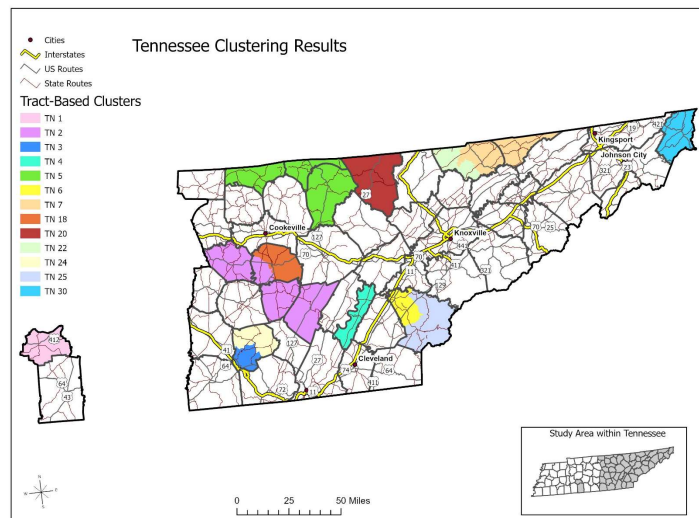
HHINC (r2 = .844)

PCTHCOCC (r2 = .797)

Final # original clusters: 30

Final # clusters after merging: 13

Several clusters with only 2 tracts



Final Clusters

## Cluster results: TN

**Final model for clustering:**

POPDEN19 (r2 = .952)

PUBLICPCT (r2 = .880)

HHINC (r2 = .844)

PCTHCOCC (r2 = .797)

Final # original clusters: 30

Final # clusters after merging: 13

Several clusters with only 2 tracts

Cluster	Tracts (N)	Households (N)	Housing Units (N)	ACS Population 2019 (Estimate)	Total Area (mi2)
TN 1	2	4,715	5,548	12,027	282.49
TN 2	11	17,695	21,596	48,085	1,118.31
TN 3	2	2,475	3,331	6,294	129.73
TN 4	3	4,938	5,888	12,104	216.75
TN 5	7	12,763	16,893	30,946	932.77
TN 6	4	11,301	12,993	29,391	178.20
TN 7	8	12,588	14,945	30,401	471.14
TN 18	4	7,092	8,382	19,158	271.38
TN 20	5	8,664	10,018	21,969	533.23
TN 22	3	3,435	4,097	7,918	193.91
TN 24	2	2,345	3,129	7,050	231.40
TN 25	3	6,686	8,242	16,673	474.39
TN 30	5	6,794	9,002	17,753	302.69

Final Clusters

## Cluster results: VA

**Final model for clustering:**

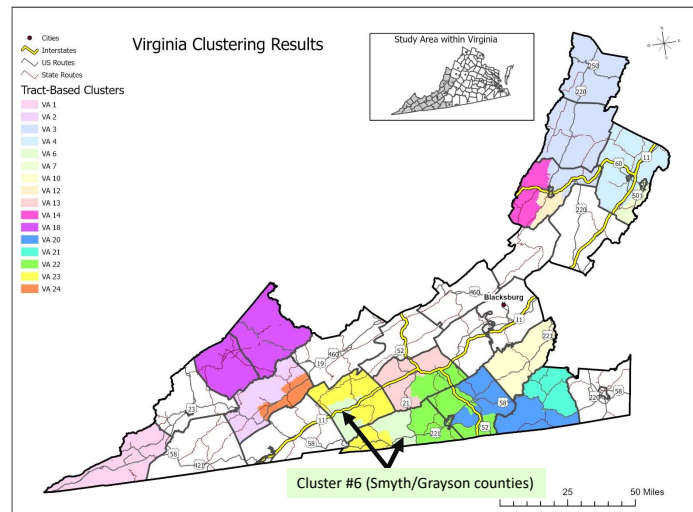
POPDEN19 (r2 = .994)

MEDDOL (r2 = .975)

Final # original clusters: 30

Final # clusters after merging: 16

Several clusters with only 2 tracts



Final Clusters

## Cluster results: VA

**Final model for clustering:**

POPDEN19 (r2 = .994)

MEDDOL (r2 = .975)

Final # original clusters: 30

Final # clusters after merging: 16

Several clusters with only 2 tracts

Cluster	Tracts (N)	Households (N)	Housing Units (N)	ACS Population 2019 (Estimate)	Total Area (mi2)
VA 1	6	9,149	11,798	23,948	437.27
VA 2	5	7,579	9,703	18,584	350.06
VA 3	6	8,373	12,131	19,233	1,104.67
VA 4	4	9,767	11,901	25,717	518.82
VA 6	5	7,599	9,405	18,156	264.23
VA 7	2	4,156	4,853	10,578	90.19
VA 10	3	6,493	8,048	15,704	381.77
VA 12	2	2,169	2,586	4,910	88.42
VA 13	4	8,427	9,956	19,703	309.81
VA 14	2	1,321	1,692	3,123	212.78
VA 18	11	14,347	19,156	36,544	837.51
VA 20	5	9,673	13,168	23,016	512.53
VA 21	2	3,920	5,051	9,029	241.54
VA 22	11	16,978	22,280	42,105	562.43
VA 23	6	7,345	9,452	17,410	444.13
VA 24	2	3,233	3,844	8,557	126.38

Final Clusters

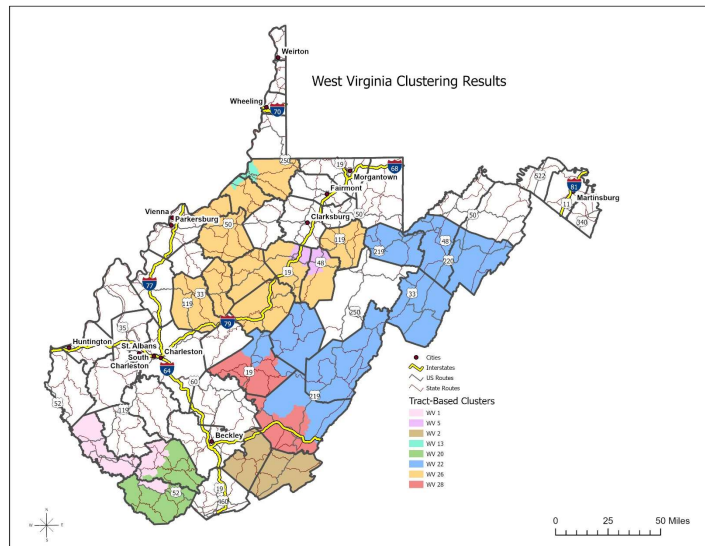
## Cluster results: WV

**Final model for clustering:**

POPDEN19 (r2 = .999)

Final # original clusters: 30

Final # clusters after merging: 8



Final Clusters

# Cluster results: WV

**Final model for clustering:**  
 POPDEN19 (r2 = .999)

Final # original clusters: 30  
 Final # clusters after merging: 8

Cluster	Tracts (N)	Households (N)	Housing Units (N)	ACS Population 2019 (Estimate)	Total Area (mi2)
WV 1	11	15,683	19,297	36,612	658.03
WV 2	7	11,284	15,346	26,249	841.37
WV 5	7	9,641	11,173	24,513	170.75
WV 13	4	4,709	5,965	12,591	68.87
WV 20	10	11,230	15,683	27,620	802.66
WV 22	23	29,463	48,061	70,173	4,453.56
WV 26	28	40,713	55,055	105,316	3,678.66
WV 28	10	19,702	24,280	46,300	907.41

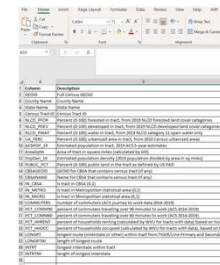
Final Clusters

# Results/Deliverables

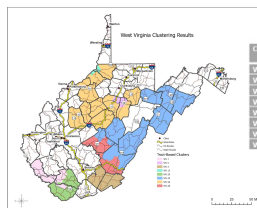
- Deliverables
  - Final Technical Report
  - Appendices (Excel)
    1. All tract data - housing
    2. All tract data - GIS
  - Figures (maps, as PDF)
  - Zip archive
- For each state:
  - Map of cluster results
  - Cluster summary table



Final report



Sample appendix



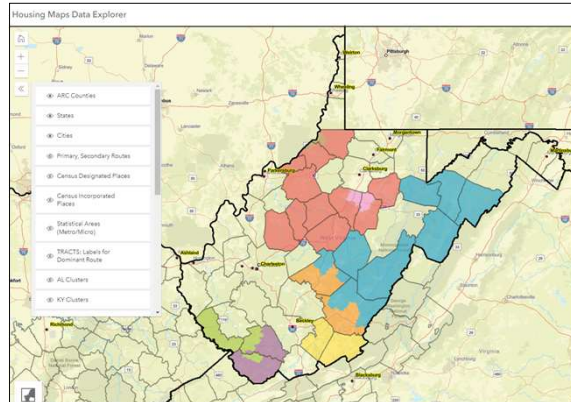
Cluster result map for WV

Cluster	Tracts (N)	Households (N)	Housing Units (N)	ACS Population 2019 (Estimate)	Total Area (mi2)
WV1	11	15,683	19,297	36,612	658.03
WV2	7	11,284	15,346	26,249	841.37
WV5	7	9,641	11,173	24,513	170.75
WV13	4	4,709	5,965	12,591	68.87
WV20	10	11,230	15,683	27,620	802.66
WV22	23	29,463	48,061	70,173	4,453.56
WV26	28	40,713	55,055	105,316	3,678.66
WV28	10	19,702	24,280	46,300	907.41

Cluster result summary table for WV

## Viewing results on the web

- Housing Maps Data Explorer (ArcGIS Online web map app)
- No password or account required
- Link: <https://arcg.is/1OLSrn>
- Layers included:
  - Cluster results by state (merged final clusters)
  - Dominant routes
  - Additional reference layers (metro/micro, CDPs, Census places)



## Operational Strategies- Substance Use Disorder

### Problem to be Solved

The Appalachian region faces a severe substance use disorder (SUD) crisis, particularly with the opioid epidemic, leading to elevated "deaths of despair." Limited housing compounds the challenges for those seeking treatment, impacting public health, emergency services, workforce participation, and community engagement.

### Strategies

**Funding and Program Access:** Proactively secure grants to support diverse opioid-use disorder programs, emphasizing proven treatment services for widespread community accessibility.

**Innovative Recovery Housing:** Acquire funding for pioneering recovery housing models that address housing needs, provide supportive services, and offer ongoing assistance, fostering a comprehensive approach to rehabilitation.

**Collaborative Partnerships for Holistic Support:** Harness existing resources and grants through partnerships with healthcare facilities, career opportunities, and transitional housing, creating a network of support for individuals in recovery.

**Education and Stigma Reduction:** Promote continuous education on best practices, clinical findings, and research related to substance use disorders, aiming to implement effective strategies while actively working to reduce societal stigma.

### What Does Success Look Like?

Fahe aims to break the generational cycles of poverty and addiction, emphasizing sustainability for prevention, treatment, and recovery initiatives. Appalachia should no longer be characterized as the epicenter of the opioid epidemic. Combining Federal, state, local, and private resources to make a significant impact should result in sharp declines in overdose and fatalities. Success is marked by frictionless access to treatment for anyone in Appalachia with SUD, leading to a larger volume of individuals in recovery living healthy, productive, and prosperous lives.

## Operational Strategy – Public Health

### Problem to be Solved

The Appalachian region grapples with escalating health disparities, marked by increasing rates of heart disease, cancer, diabetes, and stroke. The heart disease mortality rate is 17 times higher than the national average, with a common correlation between rural areas and higher cardiovascular disease rates. Access to healthcare, clean water, healthy food, and affordable housing are critical components of the public health landscape, requiring attention to bridge the existing gaps.

### Strategies

**Strategic Financial Support for Healthcare:** Secure capital to fund quality healthcare services, collaborating with health partners to ensure widespread availability in communities.

**Investment in Healthcare Infrastructure:** Allocate capital to strengthen healthcare infrastructure, promoting proximity to quality healthcare, telehealth services, and essential tools.

**Funding Health Promotion and Education:** Prioritize health promotion and education funding, integrating them into programs to facilitate access to necessary health services.

**Optimizing Referral Systems and Collaboration:** Enhance referral systems for efficient access to housing, healthcare, mental health services, and holistic support, while fostering collaboration on community-centered health initiatives to address diverse healthcare needs.

### What Does Success Look Like?

Fahe aims to transform the public health landscape in the Appalachian region. Success involves increased integration between Fahe's network and healthcare service providers, leading to improved health outcomes across the region. Long-term success is marked by enhanced accessibility and affordability of healthcare options, ultimately dispelling the region's reputation for poor health rankings. We will strive to align strategies around financial commitment, infrastructure, promotion, and collaboration.



## Operational Strategy - Broadband

### Problem to be Solved

Broadband access in the Appalachian region is marked by a rural-urban divide, with subscription rates over 20% lower in rural areas, hindering opportunities in education, telework, telehealth, business growth, and more. A lack of reliable broadband threatens to leave whole areas behind, necessitating a coordinated effort to bridge the digital divide and ensure equitable access.

### Strategies

**Strategic Capital and Platform Enhancement:** Secure capital and enhance delivery platforms to increase investment in broadband infrastructure, addressing historical disinvestment in connectivity.

**Affordable Access Advocacy:** Implement solutions for affordable broadband connectivity by seeking grants, expanding partnerships, and advocating for policies that promote affordability, deployment, and equitable access.

**Market-Driven Deployment Strategies:** Tailor broadband solutions to address market gaps, conduct community needs assessments, and leverage resources to align solutions with demands, ensuring Federal resources effectively reach the region.

**Overcoming Geographical Challenges:** Focus on realistic strategies for comprehensive broadband coverage by collaborating on infrastructure projects, leveraging grants, and forming community partnerships to overcome topographical complexities.

### What Does Success Look Like?

Fahe aims to empower Appalachian communities for a connected future, where broadband is an expectation, acting as a catalyst for economic growth, empowerment, and sustained connectivity. Success results a net-positive impact on broadband attainability, whether it be residential or community. Ultimately, success is achieving a world where high-speed broadband is universally accessible no matter who your momma is.

## Operational Strategy - Infrastructure

### **Problem to be Solved**

Appalachian residents face challenges in accessing affordable utilities and essential infrastructure, hindering economic growth. The region is lacking in not only basic utilities but also economic and workforce development infrastructure, including housing, transportation, and childcare, impacting the attraction and retention of a skilled workforce.

### **Strategies**

**Comprehensive Infrastructure Redefinition:** Expand the infrastructure definition to include housing, transportation, and childcare. Innovate solutions for housing challenges, transportation programs, and childcare deserts, redefining these elements as essential infrastructure.

**Housing Advocacy and Economic Stimulus:** Develop a unified narrative characterizing housing as crucial infrastructure. Advocate for government responsibility in providing attainable housing, emphasizing community needs assessments and resource leveraging. Invest in affordable and attainable housing to stimulate economic activity, job creation, and employee retention.

**Financial Sustainability Commitment:** Demonstrate a commitment to financial sustainability in infrastructure development through grant-seeking, expanded partnerships, and tailored solutions to address financial challenges.

**Collaborative Infrastructure Development:** Collaborate on projects, leverage grants, and form community partnerships for comprehensive infrastructure development. Consider workforce development and address exclusionary zoning practices. Strengthen relationships with Urban Local Governments (ULGs) for improved safety, public access, transportation, utilities, and community access.

### **What Does Success Look Like?**

Fahe aims to stimulate economic activity, create jobs, and enhance community well-being, emphasizing the interconnectedness of these elements in fostering sustainable and inclusive development. Built environments are capable of meeting basic needs, and state governments align on a comprehensive definition of infrastructure, contributing to a positive narrative around tailored infrastructure development solutions. Ultimately, success is marked by the creation of more livable communities with accessible, affordable, and better maintained infrastructure.

## Operational Strategy – Residency/Fellowship

### **Problem to be Solved**

The non-profit workforce in Appalachia faces a talent vacuum, with an aging workforce and motivated youth drawn out of rural areas, posing challenges in attracting, recruiting, and retaining skilled individuals. The region's labor force participation rate lags significantly behind the national average, and the specialized skills that Fahe needs are in increasingly short supply.

### **Strategies**

**Strategic Investment Prioritization:** Prioritize private investment, philanthropy, and donor-advised funds to support residency and fellowship programs, emphasizing the essential return on investment for cultivating future non-profit leaders.

**Match Requirement Solutions:** Develop methods to overcome match requirements in fellowship and residency programs, with a focus on directing leadership development funding to attract and retain promising leaders for the future.

**Leadership Engagement and Capacity Building:** Actively involve current leaders in residency and fellowship initiatives, expanding their involvement to enhance mutual benefits for participating organizations and contribute to leadership development.

**Innovative Recruitment and Capacity Expansion:** Build new residency and fellowship programs, connect Members to existing resources, and establish a centralized recruitment strategy to engage a qualified pool of professionals, while collaborating across networks to expand reach, recruitment, and retention. The traditional candidate pool is shrinking, so Fahe will need to expand the candidate pools for residency and fellowship programming, as well as recruitment more generally.

### **What Does Success Look Like?**

Fahe aims to develop and share successful, self-sustaining residency models within and outside the network, fostering collective expertise and ensuring the long-term success of organizations and the region. Success is realized through residency and fellowship programming that attracts professionals to live and serve in Appalachia, gaining ground in qualified non-profit leadership for the future. Fahe seeks to address this by emphasizing its mission-driven focus to bolster residency and fellowship programs, providing long-lasting positive community impact.

## Fahe Affiliated Partner Criteria

Thank you for your interest in becoming an Affiliated Partner of Fahe; we are building hope, building relationships, strengthening communities, and nurturing families through housing and support systems. By building on trusted relationships in Appalachia, we make more happen together. We work together and openly share brand, influence, and successful strategies. We speak with a strong voice and create dynamic impact, gathering expertise from each other. We envision Appalachia as a place proud of sustaining its culture and environment, where growth, opportunity and hope are balanced so that all people fulfill their potential with regard to housing, employment, education opportunity and quality of life.

Fahe Affiliated Partners are trusted organizations sharing a common goal with the Fahe Network to carry out activities related to the general betterment of the housing or community conditions for low-income families in Appalachia. A Prospective Affiliated Partner can be introduced/invited by a Member or by Fahe Staff.

### **Benefits of being Affiliated with the Fahe Network:**

- Access to open Fahe Meetings & Collaborative Opportunities:
  - Expertise among staff and peers
  - Networking through meetings events
  - Discounts for events
  - Access to Fahe-led Training
  - Shared Voice/Tools for Advocacy
  - Opportunities to connect to State/Regional/Federal Agencies
- Access to Capital: Lending and Equity products (subject to applicable rules/regulations)
  - Mortgages, including Broker/Loan Packager Relationships
  - Commercial loans, including Lines of credit, Construction Loans, Community Facilities Loans
  - Low Income Housing Tax Credit (LIHTC) expertise
- Program Services by contract

Becoming an Affiliated Partner is a patient process, beginning with invitations to meetings, introductions, getting to know each other, and if interested, a formal letter of request to apply. Partnership is open to Nonprofit and for-profit organizations with a mission or purpose that fits with Fahe's vision for the region serving or investing in Appalachia and a demonstrated commitment to affordable housing.

## Fahe Updates – VA Caucus

### Quarterly Reporting – 12/31/23:

Without NWOs			With NWOs		
<b>Total Organizations</b>	<b>46</b>		<b>Total Organizations</b>	<b>54</b>	
Turned in by 1/10	11	23.91%	Turned in by 1/10	19	35.19%
Turned in by 1/15	26	56.52%	Turned in by 1/15	34	62.96%
Turned in by 1/25	28	60.87%	Turned in by 1/25	36	66.67%
<b>VA Organizations</b>	<b>5</b>		<b>VA Organizations</b>	<b>6</b>	
Turned in by 1/10	0	0.00%	Turned in by 1/10	1	16.67%
Turned in by 1/15	3	60.00%	Turned in by 1/15	4	66.67%
Turned in by 1/25	3	60.00%	Turned in by 1/25	4	66.67%
Appalachian Community Action Agency (AppCAA)			Reports Sent - 1/11 Amanda D		
Helping Overcome Poverty's Existence, Inc. (HOPE)					
People, Inc.			Reports Sent - 1/18- Jamie G		
Southeast Rural Community Assistance Project (SERCAP)			Reports Sent - 1/18- Lauren M		
Bristol Housing Redevelopment Authority (BHRA)					

### **REED, Research Evaluation Evidence & Data Committee:**

Office hours: 1st Tues. 9:30-11:30am & 3rd Thurs. 1-3 pm

Standing Committee (REED): 3<sup>rd</sup> Mon. from 1:00- 2:15 pm each month

Contacts: [kstigers@fahe.org](mailto:kstigers@fahe.org)      [cmoreno@fahe.org](mailto:cmoreno@fahe.org)

### **From Partners for Rural Transformation:**

Comms – PRT has launched our comms/fund dev campaign, stage one being who is PRT. This is the perfect opportunity to learn more about the Partners, and you can follow us on the following social media sites – Twitter/X, Facebook, Instagram, and LinkedIn.

#### **Social Media links:**

- [Twitter](#)
- [Facebook](#)
- [Instagram](#)
- [LinkedIn](#)

Advocacy – PRT is working to uplift the work you are doing and working to remove structural barriers and advocate policies that make your work easier to accomplish. This fall PRT issued a comment to the Office of Management and Budget urging some changes via their Guidance for Grants and Agreements input request. The comment requested greater transparency in audits, increased flexibility in administrative costs, improved flexibility in spend down of federal awards, and uniform applications to increase accessibility and usability, just to name a few.

Staff have been working to get our project management structure in place to help create greater impact within and across the working groups.

As always, if you are interested in more information about PRT, or how you can become involved, please let us know. You can email any of the staff or our info mailbox at [PRT@pfrt.org](mailto:PRT@pfrt.org).

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