

Grantee: Tucson, AZ

Grant: B-08-MN-04-0507

July 1, 2014 thru September 30, 2014 Performance Report



Grant Number:

B-08-MN-04-0507

Obligation Date:**Award Date:****Grantee Name:**

Tucson, AZ

Contract End Date:**Review by HUD:**

Submitted - Await for Review

Grant Award Amount:

\$7,286,911.00

Grant Status:

Active

QPR Contact:

Joyce Alcantar

LOCCS Authorized Amount:

\$7,286,911.00

Estimated PI/RL Funds:

\$4,000,000.00

Total Budget:

\$11,286,911.00

Disasters:

Declaration Number

NSP

Narratives

Areas of Greatest Need:

Funds have been targeted in census tracts that have been designated as those with high foreclosure rates.

Distribution and and Uses of Funds:

The City of Tucson will spend 27.7% of the grant fund meeting the 25% set aside requirement, assisting families earning less than 50% of area median income in the designated target areas.

\$720,000 of the administration funds have been fully obligated.

The balance of the grant has been to purchase foreclosed homes to be sold under a Land Trust model to individuals/families who earn between 50 and 65% of area median income.

Definitions and Descriptions:

Ensuring Continued Affordability:

Rental units will be rented through the City of Tucson's El Portal program, with rents not to exceed Low-HOME rents, published annually, as established by HUD. Resale units will be sold through the Pima County Community Land Trust. These sales shall have a 99-year leasehold agreement, automatically renewable for an additional 99 years, with a resale restriction that limits equity to 25%. All initial buyers and subsequent buyers must be between 50% and 80% Area Median Income (AMI). All mortgages shall not exceed 35% of their gross annual income.

Definition of Blighted Structure:

Blighted structures shall be defined by reference to the City of Tucson's Neighborhood Preservation Ordinance (NPO) Section 16-14 titled "Dilapidated and Vacant Buildings and Structures; Building and Structures Constituting a Nuisance" and; Section 16-20 titled "Slum Properties, and the definitions section from Arizona Revised Statutes Title 36 - Public Health and Safety Article 3 - Slum Clearance and Redevelopment (1471). (2) and (18) "Blighted Area" and "Slum Area". The City of Tucson will not set aside any NSP 3 funding for demolition.

Definition of Affordable Rents and Income Limits

Affordable rents shall not exceed Low HOME rents as defined by HUD by bedroom size. Income limits shall not exceed 50% AMI for rental units, and shall not exceed 80% AMI for home purchasing, as defined and established by HUD.

Low Income Targeting:

The City of Tucson will purchase homes to be used as permanent rentals to families earning less than 50% of area median income.



Acquisition and Relocation:

Public Comment:

Overall	This Report Period	To Date
Total Projected Budget from All Sources	N/A	\$11,286,911.00
Total Budget	\$0.00	\$11,286,911.00
Total Obligated	\$106,525.99	\$10,384,515.56
Total Funds Drawdown	\$290,299.60	\$10,016,466.26
Program Funds Drawdown	\$0.00	\$7,015,392.70
Program Income Drawdown	\$290,299.60	\$3,001,073.56
Program Income Received	\$106,525.99	\$3,097,604.56
Total Funds Expended	\$397,636.30	\$10,414,102.56
Match Contributed	\$0.00	\$0.00

Progress Toward Required Numeric Targets

Requirement	Required	To Date
Overall Benefit Percentage (Projected)		0.00%
Overall Benefit Percentage (Actual)		0.00%
Minimum Non-Federal Match	\$0.00	\$0.00
Limit on Public Services	\$1,093,036.65	\$0.00
Limit on Admin/Planning	\$728,691.10	\$808,046.80
Limit on State Admin	\$0.00	\$808,046.80

Progress Toward Activity Type Targets

Progress Toward National Objective Targets

National Objective	Target	Actual
NSP Only - LH - 25% Set-Aside	\$1,821,727.75	\$2,765,594.82

Overall Progress Narrative:

NSP1 - The following is progress thru September 30, 2014:

Original NSP1 grant funds have been expended, leaving Program Income to be utilized for additional home purchases and rehabilitation work.

Resale progresses as the City of Tucson continues to purchase homes within the NSP1 boundaries, conveys to the Pima County Community Land Trust (PCCLT) for the rehabilitation and sale to qualified buyers.

The City of Tucson purchased and conveyed three homes this quarter. The addresses are:

6079 S. Avenue De La Chandelle, Tucson, AZ 85746

>1448 W. Argyle, Tucson, AZ 85746



>1932 W. Nava Drive, Tucson, AZ 85746

The City will not be purchasing additional homes until existing PCCLT housing stock has been rehabilitated and sold to qualified buyers. After homes have been sold and additional program income has been generated, the City will determine whether or not there will be enough funds to purchase additional homes.

In addition to the 3 recently purchased/conveyed homes, PCCLT has 2 homes in rehabilitation phase, addresses are:

7423 E. 24th Street, Tucson, AZ 85710

>915 W. Franklin Street, Tucson, AZ 85745

One home has been rehabilitated and is in escrow for purchase by a qualified buyer. Closing is scheduled for October 30, 2014. Address is:

1513 W. Greenlee Street, Tucson, AZ 85705

There were no homes sold by the PCCLT this quarter, therefore no beneficiary data will be included in this report.

The 25% Set-aside for individuals/families at or below 50% AMI has been exceeded. Program Income is being monitored so that additional rental units can be purchased when required. Rental units are assigned to the City of Tucson's EI Portal rental program. Units are currently available for rent to tenants at or below 50% AMI. There are 25 NSP1 rental units. Of the 25, 2 are vacant and 1 has an application pending. There were 3 units that were occupied during the past quarter, beneficiary data is included in this report.

Beginning July 1st, 2014, The City of Tucson, Housing and Community Development Department, Housing Assistance Division, has taken over the management of the EI Portal rental program portfolio, which includes NSP rental properties. Responsible Organization information change is reflected in this QPR.

Project Summary

Project #, Project Title	This Report Period	To Date	
	Program Funds Drawdown	Project Funds Budgeted	Program Funds Drawdown
0001, Acquisition General	\$0.00	\$10,235,673.07	\$6,532,876.29
0002, NSP Rehabilitation Rental	\$0.00	\$0.00	\$0.00
0004, NSP Rehabilitation Resale	\$0.00	\$0.00	\$0.00
0005, NSP Disposition	\$0.00	\$0.00	\$0.00
0006, NSP Administration	\$0.00	\$1,051,237.93	\$482,516.41
9999, Restricted Balance	\$0.00	\$0.00	\$0.00



Activities

Project # / Title: 0001 / Acquisition General

Grantee Activity Number: 9535

Activity Title: Acq/Rehab

Activity Category:

Disposition

Project Number:

0001

Projected Start Date:

03/23/2009

Benefit Type:

Direct Benefit (Households)

National Objective:

NSP Only - LH - 25% Set-Aside

Activity Status:

Under Way

Project Title:

Acquisition General

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

City of Tucson - EI Portal Rental Program, managed by The

Overall

Total Projected Budget from All Sources

Jul 1 thru Sep 30, 2014

N/A

To Date

\$2,765,594.82

Total Budget

\$0.00

\$2,765,594.82

Total Obligated

\$0.00

\$2,755,594.82

Total Funds Drawdown

\$100,472.45

\$2,721,583.24

Program Funds Drawdown

\$0.00

\$2,040,121.70

Program Income Drawdown

\$100,472.45

\$681,461.54

Program Income Received

\$26,415.66

\$213,915.00

Total Funds Expended

\$2,011.88

\$2,723,595.12

City of Tucson - EI Portal Rental Program, managed by The

\$0.00

\$0.00

City of Tucson1

\$2,011.88

\$2,723,595.12

Match Contributed

\$0.00

\$0.00

Activity Description:

Acquisition and rehabilitation of 17 foreclosed properties under the NSP for use as permanent rentals for client households that earn under 50% AMI.

These properties will be managed by the City of Tucson EI Portal program. While still owned by the City of Tucson, an outside agency manages the homes. All new leases of these 17 homes will be to households below 50% AMI.

Location Description:

Tucson, Arizona

Activity Progress Narrative:



Rental expenditures for the quarter were \$2,011.88 which have not been drawn down yet, but will be during the next quarter. The \$100,472.45 expenditures that were drawn down this quarter were for previous quarter expenditures. This quarter's expenditures were for the purchase of appliances for duplexes located at 3928 E. Mabel Street and 3926 E. Mabel Street, which were recently rehabilitated units that have been transferred to the City's EI Portal portfolio. (Icarpio 10/24/14).

Accomplishments Performance Measures

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Properties	0		25/17	

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Housing Units	0		22/17	
# of Multifamily Units	0		0/0	
# of Singlefamily Units	0		22/17	

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	3	0	3	25/17	0/0	25/17	100.00
# Renter Households	3	0	3	25/17	0/0	25/17	100.00

Activity Locations

Address	City	County	State	Zip	Status / Accept
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Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	



Grantee Activity Number: 9537
Activity Title: Acq/Rehab

Activity Category:

Disposition

Project Number:

0001

Projected Start Date:

03/23/2009

Benefit Type:

Direct Benefit (Households)

National Objective:

NSP Only - LMMI

Activity Status:

Under Way

Project Title:

Acquisition General

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

Pima County Community Land Trust (PCCLT)

Overall	Jul 1 thru Sep 30, 2014	To Date
Total Projected Budget from All Sources	N/A	\$7,470,078.25
Total Budget	\$0.00	\$7,470,078.25
Total Obligated	\$106,525.99	\$6,712,682.81
Total Funds Drawdown	\$178,578.37	\$6,486,836.22
Program Funds Drawdown	\$0.00	\$4,492,754.59
Program Income Drawdown	\$178,578.37	\$1,994,081.63
Program Income Received	\$80,110.33	\$2,809,586.99
Total Funds Expended	\$378,379.70	\$6,865,215.92
Pima County Community Land Trust (PCCLT)	\$378,379.70	\$6,865,215.92
Match Contributed	\$0.00	\$0.00

Activity Description:

Acquisition, rehabilitation and disposition of 37 foreclosed homes for resale to client households earning up to 80% AMI through the Pima County Community Land Trust. The Land Trust will have a land lease on these homes for 99 years, automatically renewable for an additional 99 years, that will maintain long-term affordability. The owners may not convey the home without Pima County Community Land Trust involvement and may only receive 25% of equity, if any, in addition to full return of their investment, if proceeds from a future sale allow.

Location Description:

Tucson Arizona

Activity Progress Narrative:

Resale expenditures for the quarter were \$378,379.70 which have not been drawn, but will be drawn in the next quarter. The \$178,578.37 drawn down was for previous quarter expenditures. This quarter's expenditures were for acquisition of 1448 W. Argyle Ave, 6079 S. Ave De La Chandelle, 1932 W Nava Dr. and for rehabilitation work on 1513 W Greenlee, 7423 E. 24th St., 915 W. Franklin St. and 9141 E 39th St. (Icarpio 10/24/14).

Accomplishments Performance Measures

This Report Period	Cumulative Actual Total / Expected
Total	Total



of Properties 0 38/37

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Housing Units	0		34/37	
# of Singlefamily Units	0		34/37	

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	27/37	7/0	34/37	100.00
# Owner Households	0	0	0	27/37	7/0	34/37	100.00

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

Project # / Title: 0006 / NSP Administration

Grantee Activity Number:	9123
Activity Title:	NSP Administration

Activity Category:

Administration

Project Number:

0006

Projected Start Date:

03/23/2009

Benefit Type:

N/A

National Objective:

N/A

Activity Status:

Under Way

Project Title:

NSP Administration

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

City of Tucson1



Overall	Jul 1 thru Sep 30, 2014	To Date
Total Projected Budget from All Sources	N/A	\$1,051,237.93
Total Budget	\$0.00	\$1,051,237.93
Total Obligated	\$0.00	\$916,237.93
Total Funds Drawdown	\$11,248.78	\$808,046.80
Program Funds Drawdown	\$0.00	\$482,516.41
Program Income Drawdown	\$11,248.78	\$325,530.39
Program Income Received	\$0.00	\$74,102.57
Total Funds Expended	\$17,244.72	\$825,291.52
City of Tucson1	\$17,244.72	\$825,291.52
Match Contributed	\$0.00	\$0.00

Activity Description:

Administration of NSP for Tucson, Arizona

Location Description:

Tucson, Arizona.

Activity Progress Narrative:

Administration expenditures for the quarter were \$17,244.72 which was not drawn down. The \$11,248.78 drawdown is for previous quarter expenditures. This quarter's expenditures are for salary and fringe benefits for 5 employees who are profiled to the NSP1 Program; 3 Project Coordinators, 1 Facilities Project Coordinator and a Principal Accountant. The employees' salary rate and percentage of time spent working on the NSP1 program differ. The amount of employees assigned to the NSP1 Program will be reduced in the next quarter. (Icarpio 10/24/14).

Accomplishments Performance Measures

No Accomplishments Performance Measures found.

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources

Amount

No Other Funding Sources Found

Total Other Funding Sources



