



# Third Program Year CAPER

The CPMP Consolidated Annual Performance and Evaluation Report includes Narrative Responses to CAPER questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations. The Executive Summary narratives are optional.

The grantee must submit an updated Financial Summary Report (PR26).

## GENERAL

### Executive Summary

*This module is optional but encouraged. If you choose to complete it, provide a brief overview that includes major initiatives and highlights that were proposed and executed throughout the first year.*

### **Program Year 3 CAPER Executive Summary response:**

The Consolidated Annual Performance and Evaluation Report (CAPER) details the City's accomplishments relative to established goals and priorities in the Consolidated Plan, as well as the County's HOME projects. The balance of the County's accomplishments will be submitted under separate cover.

The City of Tucson and Pima County are required to develop a five-year Consolidated Plan. This comprehensive plan contains a description of community needs, goals and priorities in the areas of affordable housing, human services, public facilities and other programs designed to improve the quality of life for low- and moderate-income residents of the community. Funding for these activities is provided by the U.S. Department of Housing and Urban Development (HUD), the City of Tucson, Pima County, and other entities.

For the period of July 1, 2007, through June 30, 2008 (fiscal year 2008), Tucson was awarded the following HUD funds:

Community Development Block Grant (CDBG)	\$6,331,206
Home Investment Partnership Program (HOME) (in a consortium with Pima County)	\$4,133,827
American Dream Downpayment Initiative (ADDI)	\$ 82,282
Emergency Shelter Grant Program (ESG)	\$ 273,819
Housing Opportunities for Persons with AIDS (HOPWA)	\$ 390,000

The following chart is a summary of our accomplishments during the 2008 fiscal year:

Activity	Accomplishments	Funds Expended*
Assistance to Homeowners (Rehabilitation)	579 households	\$2,854,739
New Homeownership Opportunities	239 units	\$3,139,601
Rental Development Assistance	120 units completed 382 underway	\$1,416,944
Assistance to the Homeless	13,356 persons assisted	\$1,294,228
Assistance to Persons with Special Needs	4,266 persons assisted	\$ 718,148
Public Facilities	12 facilities	\$ 323,270
Neighborhood Revitalization	27 projects	\$ 826,903
Public Services		
CDBG	5,045 persons assisted	\$ 942,303
ESG	6,040 persons assisted	\$ 240,447
General Funds	38,670 persons assisted	\$3,266,733

\*may include carryforward and match

## General Questions

1. *Assessment of the one-year goals and objectives:*
  - a. *Describe the accomplishments in attaining the goals and objectives for the reporting period.*
  - b. *Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.*
  - c. *If applicable, explain why progress was not made towards meeting the goals and objectives.*
2. *Describe the manner in which the recipient would change its program as a result of its experiences*
3. *Affirmatively Furthering Fair Housing:*
  - a. *Provide a summary of impediments to fair housing choice.*
  - b. *Identify actions taken to overcome effects of impediments identified.*
4. *Describe Other Actions in Strategic Plan or Action Plan taken to address obstacles to meeting underserved needs.*
5. *Leveraging Resources*
  - a. *Identify progress in obtaining "other" public and private resources to address needs.*
  - b. *How Federal resources from HUD leveraged other public and private resources.*
  - c. *How matching requirements were satisfied.*

## Program Year 3 CAPER General Questions response:

### 1. Assessment of One-Year Goals and Objectives

In the 2006-2010 Consolidated Plan, the City of Tucson established annual and five-year goals and priorities for low-income populations. The City of Tucson also incorporated the CPD Outcome Performance Measurement System, thereby ensuring that all activities have clearly defined objectives and outcomes. Detailed tables listing the City's projects by activity and fund follow a summary of accomplishments, objectives and outcomes.

Activity	Funds Expended*	Annual Goals (Planned)	Output (Accomplishment)	Objective	Outcome
Assistance to Homeowners (Rehabilitation)	\$2,854,739	500 households	579 households	Decent Housing	Sustainability
New Homeownership Opportunities	\$3,139,601	165 units	239 units	Decent Housing	Availability/ Accessibility
Rental Development or Preservation	\$1,416,944	200 households	120 units 382 underway	Decent Housing	Affordability
Assistance to the Homeless	\$1,294,228	15,000 persons assisted	13,356 persons assisted	Suitable Living Environment	Availability/ Accessibility
Assistance to Persons with Special Needs	\$718,148	3,286 persons assisted	4,266 persons assisted	Suitable Living Environment	Sustainability
Public Facilities	\$ 323,270	8 facilities	12 facilities	Suitable Living Environment	Availability/ Accessibility
Neighborhood Revitalization	\$ 826,903	4 facilities	27 projects	Suitable Living Environment	Availability/ Accessibility
Public Services (including CDBG, ESG, and General Funds)	\$4,449,483	33,370 persons assisted	49,755 persons assisted	Suitable Living Environment	Sustainability

\*may include carryforward or match

Housing - Housing quality and affordability affects households and neighborhoods, and is a major contributor to what makes a City function well. Housing that is safe and affordable is crucial to a healthy, vibrant community. The City exceeded its stated output (500) by providing housing rehabilitation assistance to 579 households, thereby sustaining decent housing in the community. The City also exceeded its stated output (165) by providing homeownership opportunities to 239 households with the objective of providing decent housing and the outcome of availability. The City also met its stated goal for rental development or preservation (200) by producing 120 and having an additional 390 units under development.

Homeless - According to the most recent homelessness survey conducted in January 2007, approximately 3,201 people are homeless in Tucson on a given day. Homeless families, specifically women with children, account for a large percentage of this population, and are the fastest growing subpopulation of people who are homeless. In addition, the elderly and the homeless veteran populations continue to increase. The City and its partner agencies will strive to achieve the annual goal of assisting 15,000 homeless individuals annually. City staff will continue working with the Tucson Planning Council for the Homeless to develop policies and coordinate comprehensive planning in support of the *Continuum of Care for the Homeless* and in the implementation of the *Ten Year Plan to End Homelessness*. In fiscal year 2008, the city served 13,356 homeless persons under the objective of a suitable living environment and primary outcome of availability.

Elderly/Special Needs - The likelihood of having a disability increases with age. In light of the aging of the Baby Boomers and increasing life expectancies, the City can expect an increase in the number of people with disabilities. Over this last year, City programs have helped over 4,266 persons with special needs with programs such as home repair, retrofitting for handicapped accessibility, nutrition, reverse mortgage counseling and loans, and housing for persons living with serious mental illness and HIV/AIDS. This was accomplished under the

objective of a suitable living environment and outcome of sustainability. (HOPWA data is recorded separately in the HOPWA section of the FY2008 CAPER).

Public Facilities – The goal of developing eight facilities annually was exceeded with the addition of 12 facilities. The City constructed or rehabilitated these facilities in partnership with other City Departments and local non-profit agencies under the objective of suitable living environment and the primary outcome of availability.

Neighborhood Revitalization – The City's Back to Basics Program, which is funded with CDBG, General Funds and transportation dollars, met its annual goal by completing six (6) projects or facilities with an additional 21 projects underway. The objective of suitable living environment and the primary outcome of availability.

Public Services - Public services address the needs of families and individuals that have difficulty maintaining a basic level of security. The City has set an annual goal of assisting 33,370 persons during a given year. During the last year, 49,755 persons received services designed to meet their unique needs and to improve the quality of their lives under the objective of suitable living environment and the primary outcome of sustainability.

**FY 2008 PROJECT TABLES**

**ASSISTANCE TO HOMEBUYERS (DOWN PAYMENT & NEW CONSTRUCTION)**

Agency	Project	Funding Source	Funds Committed	Funds Spent on Downpayment	Funds Spent on New Construction	Units	Accomplished
Chicanos Por La Causa	Down Payment Assistance	CDBG	\$50,000	\$48,243		1	family assisted
Family Housing Resources	Ward 1 Down Payment Assistance	CDBG	\$45,000	\$47,000		3	families assisted
TMM Family Services	Midtown Down Payment Assistance	CDBG	\$40,000	\$31,767		2	families assisted
Tucson Urban League	Down Payment Assistance	CDBG	\$59,000	\$63,500		10	families assisted
<b>TOTAL CDBG</b>			<b>\$194,000</b>	<b>\$190,510</b>	<b>\$0</b>	<b>16</b>	<b>assisted</b>
Chicanos Por La Causa	Westmoreland	HOME	\$601,045		\$11,772	14	underway
Chicanos Por La Causa	Copper Vista	HOME	\$1,730		\$1,730	27	underway
Chicanos Por La Causa	Copper Vista II	HOME	\$36,462		\$38,581	28	underway
Chicanos Por La Causa	Iowa Project	HOME	\$47,219		\$19,743	5	underway
Chicanos Por La Causa	Scattered Sites	HOME	\$267,689		\$168,202	2	underway
Chicanos Por La Causa	25th and 9th	HOME	\$134,408		\$52,641	5	underway
City of Tucson/CSD	ADDI Down Payment Assistance	HOME	\$93,000	\$90,000		9	families assisted
City of Tucson/CSD	ADDI Plus Down Payment Assistance	HOME	\$80,000	\$70,000		5	families assisted
City of Tucson/CSD	Program Delivery Costs	HOME	\$80,463	\$80,463		0	assisted
City of Tucson/CSD	HAP Down Payment Assistance	HOME	\$660,000	\$487,927		49	families assisted
City of Tucson/CSD	Winterhaven Condos	HOME	\$322,848		\$322,848	4	homes sold
Habitat for Humanity	Corazon del Pueblo	HOME	\$266,710		\$214,747	12	homes constructed/sold
Habitat for Humanity	Scattered Sites II	HOME	\$130,000		\$83,063	2	homes constructed/sold
Old Pueblo Community Foundation	Freestone	HOME	\$127,000		\$120,601	1	homes constructed/sold

Agency	Project	Funding Source	Funds Committed	Funds Spent on Downpayment	Funds Spent on New Construction	Units	Accomplished
Old Pueblo Community Foundation	Rio Nuevo	HOME	\$3,726		\$3,726	2	underway
Old Pueblo Community Foundation	WeChij	HOME	\$266,710		\$267,532	11	homes constructed/sold
Pima County	Copper Vista	HOME	\$6,000		\$6,000	0	duplicate2
Pima County	ADDI Down Payment Assistance	HOME	\$90,000	\$40,000		4	families assisted
Pima County	Program Delivery Costs	HOME	\$5,435	\$5,435		0	assisted
Pima County	MRB	HOME	\$120,000	\$120,000		0	assisted
Pima County	HAP Down Payment Assistance	HOME	\$480,000	\$744,080		43	families assisted
<b>TOTAL HOME</b>			<b>\$3,820,445</b>	<b>\$1,637,905</b>	<b>\$1,311,186</b>	<b>223</b>	<b>assisted</b>
<b>GRAND TOTAL</b>			<b>\$4,014,445</b>	<b>\$1,828,415</b>	<b>\$1,311,186</b>	<b>239</b>	<b>assisted</b>

**FY 2008 PROJECT TABLES**

**ASSISTANCE TO HOMEOWNERS (REHABILITATION PROJECTS)**

Agency	Project	Funding Source	Funds Committed	Funds Expended	Units	Accomplished
Chicanos Por La Causa	Housing Rehab Collaborative	CDBG	\$50,909	\$48,243	1	unit
Chicanos Por La Causa	Roof Replacement and Home Maintenance	CDBG	\$114,234	\$110,333	8	units
City of Tucson/CSD	Below Market Interest Rate Program	CDBG	\$557,394	\$250,766	31	units
City of Tucson/CSD	Emergency Home Repair	CDBG	\$478,167	\$471,452	37	units
City of Tucson/CSD	City Neighborhood Initiatives	CDBG	\$485,057	\$148,060	28	units
City of Tucson/CSD	Environmental Compliance and Resources	CDBG	\$100,920	\$42,806	0	units
City of Tucson/CSD	Back to Basics Rehabilitation Program	CDBG	\$220,108	\$141,325	24	units
City of Tucson/CSD	Lead Hazard Control Program	CDBG	\$100,000	\$42,078	0	units
City of Tucson/CSD	Vacant and Neglected Structures (VANS)	CDBG	\$170,000	\$150,141	11	units demo
Community Home Repair Projects of Arizona	City Minor Emergency Repair	CDBG	\$121,444	\$121,444	256	units
DIRECT Center for Independence	Home Access Program	CDBG	\$125,310	\$167,344	29	units
Old Pueblo Community Foundation	Rehab Program	CDBG	\$90,529	\$65,979	9	units
Pima Council on Aging	Elderly Home Repair	CDBG	\$124,176	\$121,632	22	units
Rebuilding Together Tucson	Neighborhood Renovation	CDBG	\$116,322	\$108,096	20	units

Agency	Project	Funding Source	Funds Committed	Funds Expended	Units	Accomplished
Rebuilding Together Tucson	Housing Rehab Collaborative Rio Nuevo	CDBG	\$204,732	\$129,059	12	units
TMM Family Services	Housing Rehab Program	CDBG	\$102,279	\$87,603	10	units
Tucson Urban League	City Emergency Home Repair	CDBG	\$186,811	\$170,892	29	units
Tucson Urban League	South Park Rehabilitation	CDBG	\$77,548	\$50,477	3	units
<b>TOTAL CDBG</b>			<b>\$3,425,940</b>	<b>\$2,427,730</b>	<b>530</b>	
City of Tucson/CSD	Deferred Loan Program	HOME	\$906,426	\$266,426	19	units
<b>TOTAL HOME</b>			<b>\$906,426</b>	<b>\$266,426</b>	<b>19</b>	<b>units</b>
Pima Council on Aging	Rehab Elderly Program	Older American's Act	\$159,541	\$160,583	30	assisted
<b>TOTAL</b>			<b>\$159,541</b>	<b>\$160,583</b>	<b>30</b>	<b>assisted</b>
<b>GRAND TOTAL</b>			<b>\$4,491,907</b>	<b>\$2,854,739</b>	<b>579</b>	<b>assisted</b>

**2008 PROJECT TABLES  
MULTI FAMILY ASSISTANCE**

Agency	Project	Funding Source	Funds Committed	Funds Expended	Units	Accomplished
City of Tucson/CSD	Public Housing Security Doors	CDBG	\$50,000	\$44,965	53	completed
City of Tucson/CSD	El Mercado Project (acquisition)	CDBG	\$68,000	\$59,800	4	underway
GRLLC	Ghost Ranch Project (rehabilitation)	CDBG	\$100,000	\$0	60	underway
Metropolitan Housing Corporation	Vista Sierra Rehab	CDBG	\$58,750	\$41,688	75	underway
Southern Arizona AIDS Foundation (SAAF)	Four Plex Rehab Project	CDBG	\$6,346	\$6,202	4	underway
<b>TOTAL CDBG</b>			<b>\$283,096</b>	<b>\$152,655</b>	<b>53</b>	<b>completed</b>
					<b>143</b>	<b>underway</b>
Catholic Community Services	Sam Hughes 202	HOME	\$753,077	\$542,475	56	underway
City of Tucson/CSD	Fairhaven South	HOME	\$35,049	\$34,548	4	completed
City of Tucson/CSD	Fry Apartments	HOME	\$127,356	\$301,689	48	underway
City of Tucson/CSD	El Portal/Mercado	HOME	\$500,000	\$11,080	0	duplicate
City of Tucson/CSD	Depot Plaza	HOME	\$2,310,000	\$190,659	62	underway
NCR	202 Project	HOME	\$1,000	\$1,000	63	completed
TMM Family Services	Fairhaven North	HOME	\$100,000	\$94,275	5	underway
TMM Family Services	Fairhaven South	HOME	\$23,529	\$23,529	0	duplicate
Pima County/TMM	Fairhaven South	HOME	\$22,913	\$22,913	0	completed
Tucson Urban League	Park Villa Casitas 202	HOME	\$42,121	\$42,121	68	underway
<b>TOTAL HOME</b>			<b>\$3,915,045</b>	<b>\$1,264,289</b>	<b>67</b>	<b>completed</b>
					<b>239</b>	<b>underway</b>
<b>GRAND TOTAL</b>			<b>\$4,198,141</b>	<b>\$1,416,944</b>	<b>120</b>	<b>completed</b>
					<b>382</b>	<b>underway</b>

**2008 PROJECT TABLES**

**PUBLIC FACILITIES**

Agency	Project	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
City of Tucson/CSD	Presidio Terrace/Lot 7	CDBG	\$50,000	\$12,307	1	underway
Tucson Nursery Schools	Preschool Building Rehab	CDBG	\$53,801	\$20,500	1	underway
Tucson Scottish Rite Wings on Words	Early Childhood Facility Expansion	CDBG	\$53,800	\$32,515	1	underway
YMCA of Tucson	Ott YMCA Gymnasium	CDBG	\$291,168	\$27,789	1	underway
Open Inn	Transitional Living Apartments Kitchen/Bath	CDBG	\$56,165	\$52,362	1	completed
Pima Prevention Partnership	Facility Rehab Phase II	CDBG	\$55,350	\$9,995	1	completed
CODAC	Las Amigas Roof Replacement	CDBG	\$67,935	\$75,000	1	completed
Tucson Centers for Women and Children	Domestic Violence Prevention Program	CDBG	\$59,800	\$60,000	1	completed
Community Home Repair Projects of Arizona	Office Building	CDBG	\$3,000	\$3,000	1	completed
City of Tucson/Parks & Recreation	La Pilita	CDBG	\$5,910	\$5,910	1	completed
City of Tucson/Parks & Recreation	Joaquin Park	CDBG	\$20,915	\$20,915	1	completed
Esperanza en Escalante	Multipurpose Building	CDBG	\$2,977	\$2,977	1	completed
<b>TOTAL CDBG</b>			<b>\$720,821</b>	<b>\$323,270</b>	<b>4</b>	<b>underway</b>
					<b>8</b>	<b>completed</b>

**2008 PROJECT TABLES**

**BACK TO BASICS**

Agency	Project	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Southern Arizona Council of Camp Fire	Santa Rita Skatepark	CDBG	\$243,763	\$22,739	1	underway
City of Tucson/Parks & Recreation	Freedom Park Handball Court	CDBG	\$83,119	\$83,118	1	completed
City of Tucson/Parks & Recreation	Herrera Basketball Court	CDBG	\$200,000	\$46,182	1	underway
City of Tucson/Parks & Recreation	Armory Park Lighting	CDBG	\$70,423	\$25,495	1	underway
City of Tucson/Parks & Recreation	James Thomas Lighting	CDBG	\$200,000	\$144	1	underway
City of Tucson/Parks & Recreation	Rudy Garcia Lighting	CDBG	\$304,818	\$236	1	underway
City of Tucson/Parks & Recreation	La Madera Park	CDBG	\$54,302	\$3,009	1	underway
City of Tucson/Parks & Recreation	Herrera Quiroz Basketball Court	CDBG	\$18,000	\$5,667	1	underway
Dunbar Coalition	Dunbar Landscaping	CDBG	\$15,000	\$15,000	1	completed
City of Tucson/Parks & Recreation	Escalante Park Playground	CDBG	\$79,425	\$72,047	1	underway
La Casa Cordova	La Casa Cordova Improvements	CDBG	\$61,000	\$16,846	1	underway
Rincon Heights Neighborhood	Rincon Heights Neighborhood	CDBG	\$54,000	\$7,075	1	underway
City of Tucson/Parks & Recreation	Trees at Reid Park	CDBG	\$25,000	\$4,158	1	underway
Rincon Heights Neighborhood	Rincon Heights Phase II Landscaping	CDBG	\$57,500	\$17,320	1	underway
City of Tucson/Parks & Recreation	Davidson Elementary School Recreational Improvements	CDBG	\$300,216	\$196,479	1	underway

Agency	Project	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Community Home Repair Projects of Southern Arizona	Office Building	CDBG	\$15,600	\$15,600	1	underway
City of Tucson/Parks & Recreation	Jacinto Park Improvements	CDBG	\$60,000	\$11,344	1	underway
City of Tucson/Parks & Recreation	St. John's School Children's Performance Center at Clements	CDBG	\$200,000	\$47,259	1	underway
City of Tucson/Parks & Recreation	St. Augustine's Placita	CDBG	\$794,916	\$54,296	1	underway
St. Augustine Cathedral	Community Media Center	CDBG	\$55,000	\$55,000	1	completed
ACCESS Tucson	Joaquin Murrieta Park Scoreboard Improvements	CDBG	\$11,700	\$11,532	1	underway
City of Tucson/Parks & Recreation	Building Project Enhancement	CDBG	\$53,245	\$45,704	1	underway
YWCA of Tucson	Santa Rosa Park Basketball Lighting	CDBG	\$18,729	\$18,729	1	completed
City of Tucson/Parks & Recreation	Aztec and El Rio Library Site	CDBG	\$15,000	\$15,000	1	completed
Pima County Library	Parque de Diego & Orlando Mendoza	CDBG	\$22,130	\$22,130	1	completed
City of Tucson/Parks & Recreation	ADA Office Adaptation	CDBG	\$75,000	\$14,794	1	underway
Old Pueblo Community Foundation		CDBG	\$30,000		1	underway
<b>CDBG TOTAL</b>			<b>\$3,117,886</b>	<b>\$826,903</b>	<b>27</b>	

## 2008 PROJECT TABLES

### PUBLIC SERVICES

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Business Development Finance Corporation	MCC Outreach	Adults	CDBG	\$5,000	\$5,000	35	assisted
Blake Foundation	My Summer Camp	Disabled	CDBG	\$30,015	\$30,015	50	assisted
City of Tucson/CSD	Family Self Sufficiency Program	Adults	CDBG	\$20,000	\$20,000	33	assisted
Direct Caregiver Association	Beyond the Basics	Adults	CDBG	\$100,000	\$100,000	167	assisted
Goodwill Industries of Southern Arizona	Ready to Earn Computer Customer Service Training	Adults	CDBG	\$80,000	\$80,000	40	assisted
Pima Council on Aging	Elderly Independence	Elderly	CDBG	\$46,000	\$46,000	222	assisted
Pio Decimo Center/Catholic Community Services	Early Childhood and Youth Development	Youth	CDBG	\$50,000	\$50,000	128	assisted
Brewster Center	Shelter Services	Homeless	CDBG	\$150,000	\$150,000	951	assisted
Primavera Foundation	Primavera Works	Homeless	CDBG	\$100,797	\$100,797	141	assisted
Primavera Foundation	Emergency Services Program	Homeless	CDBG	\$102,284	\$102,284		duplicate
Primavera Foundation	Crisis Emergency Services	Homeless	CDBG	\$97,413	\$97,413	1319	assisted
Primavera Foundation	Emergency Shelter Services	Homeless	CDBG	\$75,600	\$75,600	1048	assisted
Salvation Army	Emergency Assistance	Homeless	CDBG	\$12,194	\$12,194	133	assisted
Tucson Scottish Rite	Wings on Words Summer Day Camp	Disabled	CDBG	\$30,000	\$30,000	21	assisted
United Way	Earned Income Tax Credit	Adults	CDBG	\$10,000	\$10,000	757	assisted
Wingspan	A Step Up	Youth	CDBG	\$33,000	\$33,000	336	assisted
<b>TOTAL CDBG</b>				<b>\$942,303</b>	<b>\$942,303</b>	<b>5045</b>	<b>assisted</b>
Open Inn, Inc.	Crisis Assistance and Shelter	Homeless	ESG	\$101,602	\$105,058	151	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Primavera Foundation	Emergency Services Program	Homeless	ESG	\$45,418	\$42,054	1048	assisted
Primavera Foundation	Emergency Shelter Services	Homeless	ESG	\$25,000	\$25,201	1319	assisted
Primavera Foundation	TA Emergency Shelter Services	Homeless	ESG	\$25,000	\$25,000	3167	assisted
Salvation Army	Emergency Assistance	Homeless	ESG	\$27,407	\$5,475	133	assisted
TMM Family Services	Family Journey Transitional Housing	Homeless	ESG	\$35,701	\$37,659	222	assisted
<b>TOTAL ESG</b>				<b>\$260,128</b>	<b>\$240,447</b>	<b>6040</b>	
Administration of Resources and Choices	Reverse Mortgage Program	Elderly	GENERAL FUND	\$40,000	\$19,237	355	assisted
Arts for All, Inc.	Strengthening Children, Youth and Families	Disabled	GENERAL FUND	\$50,000	\$50,000	214	assisted
Beacon Group	Parenting Program	Disabled	GENERAL FUND	\$30,000	\$29,899	45	assisted
Big Brothers, Big Sisters of Tucson	One on One Youth Mentoring	Youth	GENERAL FUND	\$30,000	\$22,500	39	assisted
Blake Foundation	Parent and Child Tuition Support	Youth	GENERAL FUND	\$40,000	\$40,000	25	assisted
Boys and Girls Clubs of Tucson	SMART Moves	Youth	GENERAL FUND	\$30,000	\$30,123	320	assisted
Boys and Girls Clubs of Tucson	Ultimate Journey	Youth	GENERAL FUND	\$30,000	\$31,134	260	assisted
Brewster Center	Domestic Violence Advocacy Center	Homeless	GENERAL FUND	\$66,578	\$61,028	715	assisted
Casa de los Ninos Catholic Community Services/Community Outreach Program for the Deaf	Family Respite Care	Families	GENERAL FUND	\$30,000	\$27,794	51	assisted
	Building Skills for Employment	Disabled	GENERAL FUND	\$49,170	\$49,170	66	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Catholic Community Services/Community Outreach Program for the Deaf	Parenting with Care Case Management and Counseling Services	Disabled	GENERAL FUND	\$30,000	\$30,000	40	assisted
Catholic Community Services/Catholic Social Services	Child Care Quality Support	Families	GENERAL FUND	\$30,000	\$30,000	180	assisted
Child and Family Resources	The Center for Adolescent Parents	Youth	GENERAL FUND	\$30,000	\$30,538	2242	assisted
Child and Family Resources	Choices for Families	Youth	GENERAL FUND	\$30,000	\$30,618	57	assisted
Child and Family Resources	Happy Hours School Age Program	Families	GENERAL FUND	\$30,000	\$30,612	74	assisted
Child and Family Resources	TCAP Child Care Center	Youth	GENERAL FUND	\$35,000	\$35,529	60	assisted
Child and Family Resources	Rio Vista and Holway PAL/ASAP Program	Youth	GENERAL FUND	\$30,000	\$30,466	22	assisted
Community Extension Programs	Food Box Program	Adults	GENERAL FUND	\$40,810	\$40,810	42	assisted
Community Food Bank	Beyond the Basics Independent Living Services	Adults	GENERAL FUND	\$37,811	\$37,811	18821	assisted
Direct Caregiver Association	Preventive Health Services for Children and the Elderly	Adults	GENERAL FUND	\$30,000	\$30,898	167	assisted
DIRECT Center for Independence	Service Dog Training Program	Disabled	GENERAL FUND	\$34,000	\$38,866	67	assisted
EI Pueblo Health Center	Winter Shelter Program	Elderly	GENERAL FUND	\$30,000	\$30,000	2150	assisted
Handi Dogs, Inc.	Homeless Program	Disabled	GENERAL FUND	\$31,000	\$22,409	58	assisted
Interfaith Coalition for the Homeless	East Site Emergency Assistance	Homeless	GENERAL FUND	\$30,000	\$29,938	1386	assisted
Interfaith Community Services		Families	GENERAL FUND	\$35,626	\$35,684	1470	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Interfaith Community Services Jewish Family and Children's Services	Safe and Healthy Senior Independence Program	Elderly	GENERAL FUND	\$30,000	\$30,000	109	assisted
La Frontera Center	Serving Our Seniors Therapeutic Preschool	Elderly Youth	GENERAL FUND GENERAL FUND	\$30,000 \$31,193	\$30,000 \$23,395	54 6	assisted assisted
Las Familias	Extended Crisis Services Project	Adults	GENERAL FUND	\$42,035	\$42,035	211	assisted
Las Familias	Sexual Abuse Counseling Services	Adults	GENERAL FUND	\$30,000	\$30,000	94	assisted
Life Directions	Peer Motivation/ Mentoring Program	Youth	GENERAL FUND	\$32,500	\$32,500	54	assisted
Lutheran Social Ministry of the Southwest	Senior and Disabled Public Housing Activities Program	Elderly	GENERAL FUND	\$39,250	\$36,608	146	assisted
Make Way for Books	Reading Readiness Support	Youth	GENERAL FUND	\$30,000	\$32,035	355	assisted
Metropolitan Education Commission	Academy Without Walls	Youth	GENERAL FUND	\$30,000	\$29,600	15	assisted
Miracle Square, Inc.	Independent Living Support	Elderly	GENERAL FUND	\$50,000	\$50,000	74	assisted
Nosotros, Inc.	El Rio Daycare Transitional	Youth	GENERAL FUND	\$30,000	\$22,500	152	assisted
Open Inn, Inc.	Apartment Living Program	Homeless	GENERAL FUND	\$35,685	\$35,685	17	assisted
Our Family Services, Inc.	DV/Sexual Assault Services	Homeless	GENERAL FUND	\$80,600	\$82,022	1197	assisted
Parent Aid Child Abuse Prevention Center	In Home Parent Support Program	Families	GENERAL FUND	\$30,000	\$30,126	177	assisted
Pima Community College	GED Now!	Adult	GENERAL FUND	\$45,021	\$39,201	179	assisted
Pima Council on Aging	Elder Support	Elderly	GENERAL FUND	\$30,000	\$30,000	14	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Pima Council on Aging	Family Caregiver Support Program	Families	GENERAL FUND	\$30,000	\$28,544	86	assisted
Pima Council on Aging	Home Repair, Adaptation and Maintenance for the Elderly	Elderly	GENERAL FUND	\$30,000	\$30,000	52	assisted
Pima Council on Aging	Home Care Services for the Elderly	Elderly	GENERAL FUND	\$30,000	\$30,000	36	assisted
Pima Council on Aging	Nutrition Program for the Elderly	Elderly	GENERAL FUND	\$30,000	\$41,463	60	assisted
Pima Prevention Partnership	Pima County Parenting Coalition	Families	GENERAL FUND	\$35,685	\$38,377	472	assisted
Pima Prevention Partnership	Pima County Teen Court	Youth	GENERAL FUND	\$30,000	\$29,279	360	assisted
Pima Prevention Partnership	Pima County Teen Court Youth Leaders	Youth	GENERAL FUND	\$35,948	\$35,255	124	assisted
Primavera Foundation	Primavera Works	Homeless	GENERAL FUND	\$30,000	\$20,261	737	assisted
Southern Arizona Children's Advocacy Center	Clinical Services for Victims of Abuse	Youth	GENERAL FUND	\$60,000	\$60,137	789	assisted
St. Elizabeth of Hungary Clinic	Emergency Medication Assistance	Adult	GENERAL FUND	\$30,000	\$23,790	117	assisted
St. Elizabeth of Hungary Clinic	Mobile Podiatry	Elderly	GENERAL FUND	\$40,000	\$36,174	282	assisted
The Parent Connection	Parenting Education, Information and Support	Families	GENERAL FUND	\$30,000	\$30,000	299	assisted
Tucson Scottish Rite Charitable Foundation	Comprehensive Early Intervention Program	Youth	GENERAL FUND	\$40,000	\$31,958	16	assisted
Primavera Foundation	Support Services Housing for Homeless People with Disabilities	Homeless	GENERAL FUND	\$59,000	\$53,905	17	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Primavera Foundation	Women in Transition Neighborhood Support	Homeless	GENERAL FUND	\$41,000	\$38,335	25	assisted
Pro Neighborhoods		Adults	GENERAL FUND	\$93,120	\$93,120	222	assisted
Tucson Youth Development	School Plus Jobs	Youth	GENERAL FUND	\$637,683	\$657,767	355	assisted
Tucson Centers for Women and Children	DV Crisis Assistance	Homeless	GENERAL FUND	\$65,000	\$63,945	1499	assisted
Tucson Centers for Women and Children	Angel Children's Center	Youth	GENERAL FUND	\$40,000	\$41,712	94	assisted
Tucson International Alliance of Refugee Communities	Learning Center for Women and Children	Adult	GENERAL FUND	\$35,000	\$34,986	31	assisted
Tucson Nursery Schools	Children's Assessment Portfolios	Youth	GENERAL FUND	\$50,000	\$50,000	16	assisted
Tucson Unified School District	Exploring our Future	Youth	GENERAL FUND	\$130,000	\$105,016	48	assisted
Tucson Urban League	Senior Lunch and Recreation Program	Elderly	GENERAL FUND	\$30,000	\$28,307	151	assisted
Tucson Urban League	Early Learning Childcare Services	Youth	GENERAL FUND	\$35,000	\$34,619	15	assisted
Tucson Youth Development	Transition Counseling Program	Youth	GENERAL FUND	\$44,515	\$41,308	155	assisted
VOICES Community Stories	110 Degrees Afterschool Magazine Project	Youth	GENERAL FUND	\$73,000	\$61,816	30	assisted
Wingspan	Growing Up Proud and Strong	Homeless	GENERAL FUND	\$31,000	\$32,007	283	assisted
Wingspan	Anti Violence Project	Youth	GENERAL FUND	\$34,000	\$33,881	336	assisted
Youth on their Own	Special Needs	Homeless	GENERAL FUND	\$40,000	\$40,000	183	assisted
<b>TOTAL GENERAL FUND</b>				<b>\$3,366,230</b>	<b>\$3,266,733</b>	<b>38670</b>	<b>assisted</b>
<b>GRAND TOTAL</b>				<b>\$4,568,661</b>	<b>\$4,449,483</b>	<b>49755</b>	<b>assisted</b>

**2008 PROJECT TABLES**

**ASSISTANCE TO THE HOMELESS**

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Brewster Center	Shelter Services	Homeless	CDBG	\$150,000	\$150,000	951	assisted
Brewster Center	Domestic Violence Advocacy Center	Homeless	GENERAL FUND	\$66,578	\$61,028	715	assisted
Interfaith Coalition for the Homeless	Winter Shelter Program	Homeless	GENERAL FUND	\$30,000	\$29,938	1386	assisted
Open Inn, Inc.	Crisis Assistance and Shelter	Homeless	ESG	\$101,602	\$105,058	151	assisted
Open Inn, Inc.	Transitional Apartment Living Program	Homeless	GENERAL FUND	\$35,685	\$35,685	17	assisted
Our Family Services, Inc.	DV/Sexual Assault Services	Homeless	GENERAL FUND	\$80,600	\$82,022	1197	assisted
Primavera Foundation	Primavera Works	Homeless	CDBG	\$100,797	\$100,797	141	assisted
Primavera Foundation	Emergency Services Program	Homeless	CDBG	\$102,284	\$102,284		duplicate
Primavera Foundation	Crisis Emergency Services	Homeless	CDBG	\$97,413	\$97,413		duplicate
Primavera Foundation	Emergency Shelter Services	Homeless	CDBG	\$75,600	\$75,600	1048	assisted
Primavera Foundation	Emergency Services Program	Homeless	ESG	\$45,418	\$42,054		duplicate
Primavera Foundation	Emergency Shelter Services	Homeless	ESG	\$25,000	\$25,201	1319	assisted
Primavera Foundation	TA Emergency Shelter Services	Homeless	ESG	\$25,000	\$25,000	3167	assisted
Primavera Foundation	Primavera Works Support Services	Homeless	GENERAL FUND	\$30,000	\$20,261	737	assisted
Primavera Foundation	Housing for Homeless People with Disabilities	Homeless	GENERAL FUND	\$59,000	\$53,905	17	assisted
Primavera Foundation	Women in Transition	Homeless	GENERAL FUND	\$41,000	\$38,335	25	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
RISE	Toole	Homeless	CDBG	\$58,367	\$58,367	165	assisted
Salvation Army	Emergency Assistance	Homeless	CDBG	\$12,194	\$12,194	133	assisted
Salvation Army	Emergency Assistance	Homeless	ESG	\$27,407	\$5,475	0	assisted
TMM Family Services	Family Journey	Homeless	ESG	\$35,701	\$37,659	222	assisted
Tucson Centers for Women and Children	Transitional Housing	Homeless	GENERAL FUND	\$65,000	\$63,945	1499	assisted
Wingspan	DV Crisis Assistance	Homeless	GENERAL FUND	\$31,000	\$32,007	283	assisted
Youth on their Own	Growing Up Proud and Strong	Homeless	GENERAL FUND	\$40,000	\$40,000	183	assisted
<b>TOTAL HOMELESS</b>	Special Needs	Homeless		<b>\$1,335,646</b>	<b>\$1,294,228</b>	<b>13356</b>	

**2008 PROJECT TABLES  
SPECIAL POPULATIONS**

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Arts for All, Inc.	Strengthening Children, Youth and Families	Disabled	GENERAL FUND	\$50,000	\$50,000	214	assisted
Beacon Group	Parenting Program	Disabled	GENERAL FUND	\$30,000	\$29,899	45	assisted
Blake Foundation	My Summer Camp	Disabled	CDBG	\$30,015	\$30,015	50	assisted
Catholic Community Services/Community Outreach Program for the Deaf	Building Skills for Employment	Disabled	GENERAL FUND	\$49,170	\$49,170	66	assisted
Catholic Community Services/Community Outreach Program for the Deaf	Parenting with Care	Disabled	GENERAL FUND	\$30,000	\$30,000	40	assisted
DIRECT Center for Independence	Independent Living Services	Disabled	GENERAL FUND	\$34,000	\$38,866	67	assisted
Handi Dogs, Inc.	Service Dog Training Program	Disabled	GENERAL FUND	\$31,000	\$22,409	58	assisted
Tucson Scottish Rite	Wings on Words	Disabled	CDBG	\$30,000	\$30,000	21	assisted
Administration of Resources and Choices	Summer Day Camp	Disabled	GENERAL FUND	\$40,000	\$19,237	355	assisted
El Pueblo Health Center	Reverse Mortgage Program	Elderly	GENERAL FUND	\$30,000	\$30,000	2150	assisted
	Preventive Health Services for Children and the Elderly	Elderly	GENERAL FUND	\$30,000	\$30,000		
Interfaith Community Services	Safe and Healthy Senior Independence Program	Elderly	GENERAL FUND	\$30,000	\$30,000	109	assisted
Jewish Family and Children's Services	Serving Our Seniors	Elderly	GENERAL FUND	\$30,000	\$30,000	54	assisted
Lutheran Social Ministry of the Southwest	Senior and Disabled Public Housing Activities Program	Elderly	GENERAL FUND	\$39,250	\$36,608	146	assisted

Agency	Project	Target Group	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Miracle Square, Inc.	Independent Living Support	Elderly	GENERAL FUND	\$50,000	\$50,000	74	assisted
Pima Council on Aging	Elderly Independence	Elderly	CDBG GENERAL FUND	\$46,000	\$46,000	222	assisted
Pima Council on Aging	Elder Support Home Repair, Adaptation and Maintenance for the Elderly	Elderly	GENERAL FUND	\$30,000	\$30,000	14	assisted
Pima Council on Aging	Home Care Services for the Elderly	Elderly	GENERAL FUND GENERAL FUND	\$30,000	\$30,000	52	assisted
Pima Council on Aging	Nutrition Program for the Elderly	Elderly	GENERAL FUND GENERAL FUND	\$30,000	\$30,000	36	assisted
Pima Council on Aging		Elderly	GENERAL FUND	\$30,000	\$41,463	60	assisted
St. Elizabeth of Hungary Clinic	Mobile Podiatry Senior Lunch and Recreation Program	Elderly	GENERAL FUND GENERAL FUND	\$40,000	\$36,174	282	assisted
Tucson Urban League		Elderly	GENERAL FUND	\$30,000	\$28,307	151	assisted
<b>TOTAL SPECIAL POPULATIONS</b>				<b>\$739,435</b>	<b>\$718,148</b>	<b>4266</b>	

**2008 PROJECT TABLES**

**Planning**

Agency	Project	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Drachman Institute Interfaith Coalition for the Homeless	Housing Planner Homeless Planning and Coordination	CDBG	\$20,888	\$24,705	1	1 underway
Old Pueblo Community Foundation	Neighborhood Plan Fair Housing, Outreach, Education and Compliance	CDBG	\$30,000	\$30,000	1	1 plan produced
Southwest Fair Housing Council	Project	CDBG	\$10,366	\$10,366	1	1 plan produced
<b>TOTAL</b>			<b>\$91,254</b>	<b>\$92,059</b>	<b>4</b>	<b>4 plans produced</b>

2008 PROJECT TABLES						
Economic Development						
Agency	Project	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
Microbusiness Advancement	Childcare Pilot Project	CDBG	\$24,753	\$24,753	25	assisted
	Microenterprise Training and Loans Project	CDBG	\$64,133	\$38,232	10	assisted
<b>TOTAL</b>			<b>\$88,886</b>	<b>\$62,985</b>	<b>35</b>	<b>assisted</b>

2008 PROJECT TABLES						
CDBO						
Agency	Project	Funding Source	Funds Committed	Funds Expended	Unit	Accomplished
RISE	Toole	CDBG	\$58,367	\$58,367	165	assisted
<b>TOTAL</b>			<b>\$58,367</b>	<b>\$58,367</b>	<b>165</b>	<b>assisted</b>

## **2. Describe the manner in which the recipient would change its program as a result of its experiences.**

The City of Tucson would encourage stronger linkages between its Human (public) Services Planning process and its Community Development Block Grant Public Facilities solicitation process so that the goals of each respective process are integrated. For example, if it is desirable to have a public facility that houses homeless persons under the auspices of a housing first model funded through public facilities dollars, then linking funding of public services dollars to provide wrap-around services should be strongly encouraged.

## **3. Actions to Affirmatively Further Fair Housing**

The City of Tucson and Pima County are a consortium which receives entitlement funds and collaborates to conduct the Analysis of Impediments (AI) process and submit the AI report to HUD. The latest Analysis of Impediments document was completed in December 2004, and can be found on the City's web site at: [www.tucsonaz.gov/csd](http://www.tucsonaz.gov/csd). The report was drafted by the Southwest Fair Housing Council (SWFHC) in collaboration with the Southwest Center for Economic Integrity (SCEI), and with funding from Pima County. This work was done on behalf of the consortium, which includes Pima County and the City of Tucson. Please note that 2008-2009 CDBG funds have been allocated to provide for an update to the current Analysis of Impediments and is expected to be completed by December 2008.

### **Primary Goals:**

The consortium's primary goals in developing this AI and implementing its Plan of Action are consistent with HUD objectives in requiring CDBG jurisdictions to affirmatively further fair housing and include the following:

1. Eliminate all forms of illegal housing discrimination in Pima County.
2. Actively promote fair housing choice for all persons in Pima County.
3. Provide opportunities in all areas of Pima County for inclusive patterns of housing occupancy regardless of race, color, religion, sex, familial status, disability and national origin.
4. Actively promote housing that is structurally accessible to and usable by, all persons, particularly persons with disabilities in Pima County.
5. Foster compliance with the nondiscrimination provisions of the Fair Housing Act in all areas of Pima County.

### **Intermediate Goals:**

The City of Tucson and Pima County have established the following intermediate goals to facilitate achieving the 5 overall goals identified above:

1. Maintain a firm and continued commitment to the analysis, planning, and implementation necessary to achieve fair housing goals.
2. Guarantee oversight by the City of Tucson Mayor and Council and the Pima County Board of Supervisors to ensure an ongoing fair housing program.

3. Create a comprehensive Analysis of Impediments to Fair Housing (AI) document, and devise a carefully structured plan for addressing impediments that are firmly grounded in the AI's conclusions.
4. Take effective actions based on a realistic assessment of available resources.
5. Identify and track measurable results in meeting local fair housing goals.
6. Increase cooperation between public and private agencies in promoting public awareness of fair housing issues.
7. Educate the public on fair housing issues.
8. Effectively enforce fair housing laws.
9. Increase community awareness and promote equal housing opportunity and fair housing choices in the community.

### **AI 2004 Findings and Plan of Action:**

The 2004 Plan of Action seeks to reduce the rhetoric often used in action plans. The Identification of Impediments and Plan of Action for 2004 are more focused on Fair Housing than in 2000. Thus the 2004 Plan of Action is concerned with ways to facilitate better communication between fair housing and planning for (for example) economic development, transportation, affordable housing, etc. The 2004 Plan of Action seeks to provide for more input of fair housing information into the planning process and in turn a better understanding of the impact on these programs on fair housing choice. It is this information that can then be reported and acted upon in revisions in the Plan of Action.

The following are the impediments that were identified by the 2004 AI and the Plan of Action to address them.

<b>Impediment</b>	<b>Action Plan</b>
1. Illegal Housing Discrimination in the following areas: <ol style="list-style-type: none"> <li>a. Home Sales</li> <li>b. Apartment and Housing Rental</li> <li>c. Home Lending Including Mortgage lending, Rehab and Home Equity loans</li> <li>d. Home Insurance</li> <li>e. Persons with Disabilities including Accessibility in design and construction</li> </ol>	a. The City and County will pursue continued support of enforcement programs that are broad based (service all areas of FHA) and 1) Intake, investigate and process complaints, including filing with HUD and the AG. 2) Assist complainants to remedy damages through conciliation or litigation. 3) Conduct testing to monitor the compliance of housing providers with all fair housing laws. 4) Release and publicize awards and settlements in fair housing cases to encourage compliance. 5) Monitor and review housing industry advertising
2. A lack of knowledge and understanding of the rights and responsibilities afforded under fair housing laws along with a need for a better understanding and appreciation of	a. Informational presentations and trainings will be provided to <u>housing consumers</u> (including home buyers, renters, home loan and insurance seekers and persons with disabilities) to educate them in fair

<p>why and how diversity in neighborhoods contribute to better communities</p>	<p>housing rights, how to identify housing discrimination and where to go for help if housing discrimination is encountered.</p> <ul style="list-style-type: none"> <li>b. Informational presentations and trainings will be provided to <u>housing providers</u> (including real estate agents, property managers, landlords, property owners, lenders, insurance agents, Architects, contractors and builders) regarding their responsibilities under fair housing laws, and what they need to do to comply.</li> <li>c. A wide range of informational fair housing pamphlets and literature will be produced and made available through City and County program offices; organizations and businesses throughout the County; at a wide variety of distribution points in the community, such as libraries and churches; and at public and private events, trainings, forums, meetings and conferences. Records will be kept of the type of literature, the location of distribution and the approximate number distributed.</li> <li>d. Fair housing events and presentations at other community events and conferences will be conducted to build a greater awareness of fair housing and appreciation of diversity. These will include housing fairs, fair housing month celebrations in April, a workshop at the Affordable Housing Conference, poster contests for youth, and neighborhood, church, ethnic and organizational events such as Juneteenth Day, Cinco de Mayo, CDBG events and the Dr. Martin Luther King Day Celebration.</li> <li>e. A community survey similar to the survey contained in this report will be annually conducted to monitor changes in fair housing concerns and knowledge.</li> </ul>
<p>3. Continuing problems with accessibility for persons with disabilities including the following:</p> <ul style="list-style-type: none"> <li>a. Lack of accessibility in rental housing</li> <li>b. Lack of accessible designs in new single family housing</li> <li>c. Resistance on the part of the</li> </ul>	<ul style="list-style-type: none"> <li>a. Testing as well as education and outreach for accessibility will be conducted (see Action Plan for Impediment 1 &amp; 2).</li> <li>b. Trainings for property owners, builders and contractors regarding their responsibilities to meet FHA accessibility requirements independent of local building codes will be conducted.</li> </ul>

<p>housing industry to mandated accessible visitability.</p> <p>d. A shortage of funding for modifications to improve accessibility in older housing units.</p>	<p>c. The City and County will train inspectors to increase the focus on accessibility requirements.</p> <p>d. SWFHC will engage builders who are building accessibility into their homes to collaborate with fair housing staff to conduct trainings and workshops regarding the increased marketability of building accessible homes with construction companies that are producing accessible homes.</p> <p>e. SWFHC will collaborate with the Attorney General's Office to formalize a strategy to include contributions to modification programs as part of conciliation agreements and settlements by Respondents in cases where they have violated the accessibility requirements of FHA</p>
<p>4. The prevalence of predatory, abusive and unethical lending practices in Pima County as well as the disparate provision of services by lenders to minority residents, neighborhoods and communities.</p>	<p>a. The Fair Housing Coalition – a consortium of 11 organizations will work with the AG's Office to attain passage by the State Legislature of an effective anti-predatory lending Statute</p> <p>b. Pima County and the City of Tucson will pursue the investigation, analysis and reporting on predatory and abusive lending practices in Pima County. This will include continued monitoring of foreclosures and a study of abuses regarding Contracts for Deed. The investigation of Contracts for Deed will include a feasibility analysis of drafting and passing a countywide ordinance regulating Contracts for Deed.</p> <p>c. SWFHC will monitor annual HMDA data and evaluate and report on the results. The information will be made available through reports at forums and conferences and press releases.</p>
<p>5. Need for better communication and coordination between City and County Planning and Fair Housing personnel. Greater input by Fair Housing personnel is needed in the Planning Process as well as assessment, recommendations, information gathering and reporting. This includes planning in the following areas:</p> <p>a. Transportation</p> <p>b. Affordable Housing</p>	<p>a. The City, County and organizations interested in fair housing will seek to develop a plan to improve communication and allow for greater participation and input into the planning processes identified in Impediment #4. This plan will also allow for greater information gathering and reporting on the impact of specific public policies on fair housing choice in Pima County.</p>

<ul style="list-style-type: none"> <li>c. Economic Development</li> <li>d. Sub Standard Housing</li> <li>e. Community, Neighborhood Development and Preservation</li> <li>f. Zoning</li> <li>g. Building Codes</li> <li>h. Inadequate Infrastructure</li> <li>i. Employment and the Living Wage Issue</li> <li>j. Deeds and Records</li> </ul>	
<p>6. The need for more fair housing training and better communication between fair housing staff and personnel conducting and participating in community programs.</p>	<ul style="list-style-type: none"> <li>a. SWFHC will develop and implement a fair housing training schedule for the staff of public and private organizations and agencies involved in housing in Pima County.</li> <li>b. SWFHC will continue to work with Section 8 to train staff, review policies and conduct hearings.</li> </ul>
<p>7. The need for more Fair Housing services in underserved areas of the County including Colonias.</p>	<ul style="list-style-type: none"> <li>a. SWFHC will conduct a program funded by HUD to increase fair housing services to Colonias, including those in Pima County.</li> <li>b. SWFHC will collaborate with Pima County to establish a walk-in housing clinic in the Old Nogales Hwy. Colonia outside of Tucson.</li> </ul>

Currently, the City allocates \$25,000 annually to the Southwest Fair Housing Council for fair housing activities.

#### 4. Other Actions

This section describes activities that were undertaken by the City and Pima County to address obstacles to meeting underserved needs.

#### **Addressing Obstacles to Meeting Underserved Needs**

Tucson strives to meet the underserved needs of the community. This is accomplished through programs and services to homeowners and renters.

#### **Homeowners**

In 1999, the Mayor and Council directed CDBG-funded housing rehabilitation organizations to develop a coordinated strategy for providing home repair to low-income households community-wide. Nine partner organizations with long-standing programs formed a collaboration and began working on several goals: 1) incorporation of home maintenance, education and preventative care in housing rehabilitation programs; 2) streamlining of the application process for eligible households to apply and receive housing rehabilitation assistance; 3) determining cost-effective and efficient ways to purchase supplies and make repairs when combining resources; and 4) applying for a portion of the annual CDBG allocation to fund a coordinated strategy.

## Renters

Very low-income renters often experience difficulty obtaining decent, affordable housing. Tucson assists the very low-income renter population by providing 1,505 units of public housing; 3,836 units of Section 8 rental housing; 802 Section 8 units administered for Pima County; and 110 moderate rehab units.

Other programs that assist renters include: State Low-Income Housing Tax Credits, HOME-funded Rental Housing Partnership, El Portal, HUD 202, 236, and 811 programs.

## Housing Trust Fund

Last year, the City of Tucson and the Metropolitan Housing Commission worked with the Mayor and Council to create the Tucson Housing Trust Fund. The fund is intended to provide additional monies for affordable housing projects in the City of Tucson. Initial, one time funding has been allocated for FY09 in the amount of \$170,000 and an additional pledge of \$2 million, pending a legal settlement. The fund lacks a sustainable, recurring funding source. The Mayor and Council appointed a 15 member Citizen's Advisory Committee to oversee the development of the fund. The Citizen Advisory Committee has reviewing possible funding sources and intends to present their suggestions to Mayor and Council in November 2008.

## 5. Leveraging Resources

Wherever possible, the City attracts additional resources by submitting grant applications and providing support to organizations that apply to competitive grant programs. The City has been successful in attracting grants to support agencies that provide housing and services. These include: The Affordable Housing Program of the Federal Home Loan Bank, State of Arizona HOME Program and Housing Trust Fund, Supportive Housing Program (SHP), HOPE VI Program, and HOPE 3 programs. The City has contributed general funds to meet HOME program match and for activities which support the homeless.

Source	Amount
<b>FEDERAL FUNDS</b>	
HURF - B2B	\$1,319,231
Continuum of Care	\$6,410,805
<b>LOCAL FUNDS</b>	
City/County Industrial Development Authorities	\$19,209,108
Pima County Bonds	\$394,550
City General Fund	\$4,427,432
<b>PROGRAM INCOME</b>	
CDBG	\$18,144
HOME	\$248,875
CDBG Revolving Loan Fund	\$117,306
<b>NON-PROFIT &amp; PRIVATE FUNDS</b>	
Donations, Labor and Materials	\$488,841
Fees	\$75,040
<b>TOTAL</b>	<b>\$32,709,332</b>

## **Managing the Process**

1. *Describe actions taken during the last year to ensure compliance with program and comprehensive planning requirements.*

### **Program Year 3 CAPER Managing the Process response:**

#### **1. Managing the Process**

##### **Lead Agency**

The City of Tucson and Pima County formed a HOME consortium in 1992. The City of Tucson Community Services Department is the lead agency for the development of the Consolidated Plan. The City receives funds from five HUD formula grant programs covered by the Consolidated Plan: the Community Development Block Grant (CDBG), HOME Investment Partnerships program (HOME), American Dream Downpayment Initiative (ADDI), Emergency Shelter Grant (ESG) and Housing Opportunities for Persons with AIDS (HOPWA) programs.

The 2006-2010 Consolidated Plan and the FY2008 Annual Action Plan are available on the City of Tucson's website at: [www.tucsonaz.gov/csd](http://www.tucsonaz.gov/csd).

##### **Consolidated Plan Development/Annual Action Plans**

While the City of Tucson serves as the lead agency for development of the Consolidated Plan, a number of other public and private agencies participated in its development. The Institutional Structure portion of this plan fully describes the various entities involved in the development of the Consolidated Plan and the Annual Action Plan.

The City and County held six public meetings that were the primary tools for obtaining input from residents and various housing, homeless, special needs and other service providers. The 2006-2010 Consolidated Plan contains a summary report of the meetings, including the names and affiliations of the 160 participants.

Through funding mechanisms, the City of Tucson and Pima County will facilitate coordination between service providers and housing providers.

##### **Citizen Participation**

1. *Provide a summary of citizen comments.*
2. *In addition, the performance report provided to citizens must identify the Federal funds made available for furthering the objectives of the Consolidated Plan. For each formula grant program, the grantee shall identify the total amount of funds available (including estimated program income), the total amount of funds committed during the reporting period, the total amount expended during the reporting period, and the geographic distribution and location of expenditures. Jurisdictions are encouraged to include maps in describing the geographic distribution and location of investment (including areas of minority concentration). The geographic distribution and expenditure requirement may also be satisfied by specifying the census tracts where expenditures were concentrated.*

*\*Please note that Citizen Comments and Responses may be included as additional files within the CPMP Tool.*

## **Program Year 2 CAPER Citizen Participation response:**

### **1. Summary of Citizen Comments**

There were no citizen comments received during the 30-day comment period, which began on August 29, 2008, and ended at 5:00 pm, on September 30, 2008.

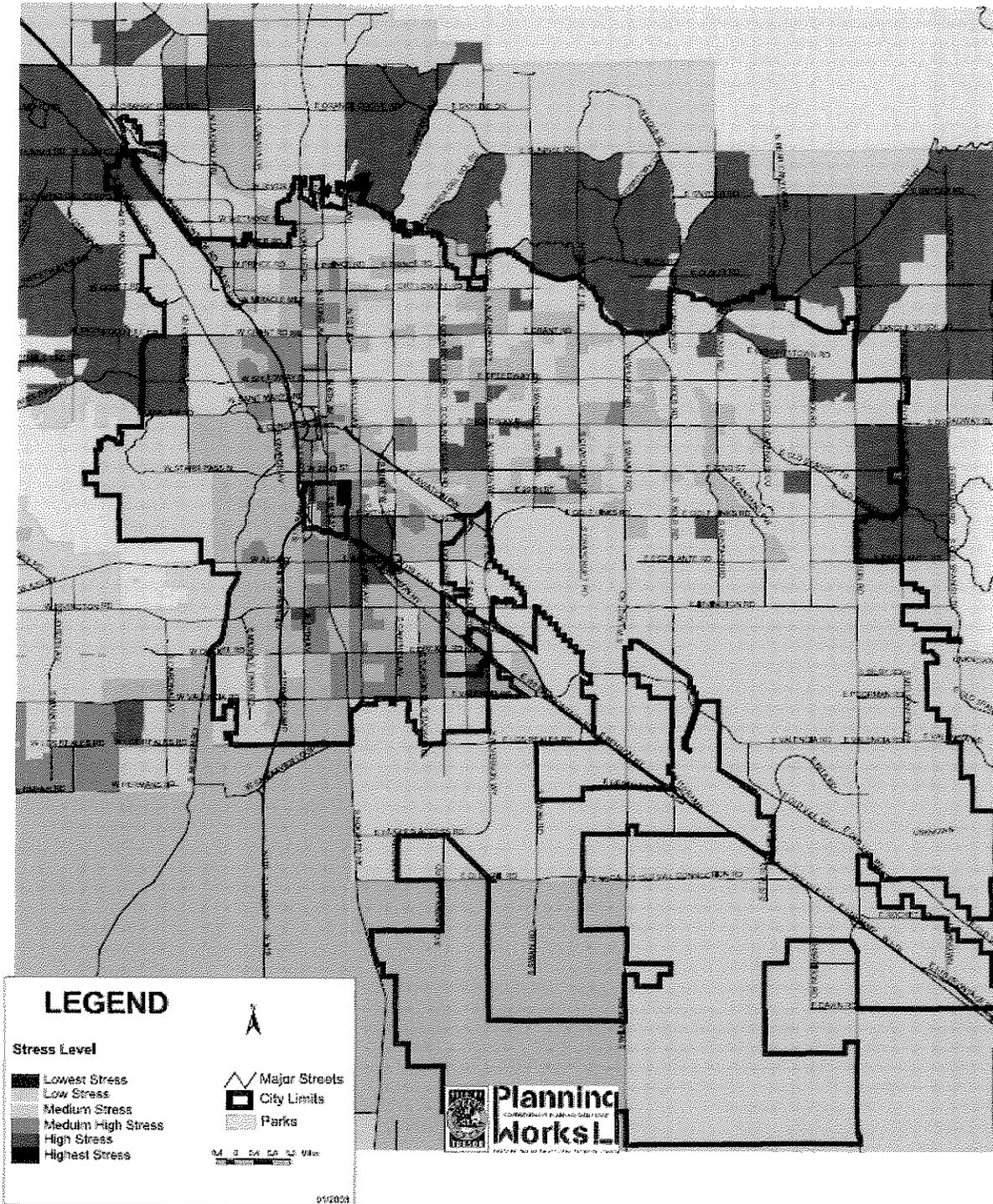
### **2. Geographic Distribution**

The following census tracts are considered low-income areas with minority concentration (50% or more minority residents): 2, 3, 8, 9, 10, 11, 12, 13.02, 20, 21, 23, 24, 25.01, 37.01, 38, 42, 43.08, 44.07, 48, 50. See the census map on page 29. The City invests entitlement funds in areas of minority concentration. These funds are broadly distributed because most of the City's entitlement-supported programs are open to income-eligible residents city-wide.

The City allocates funding in several ways, to ensure investment in areas of minority concentration:

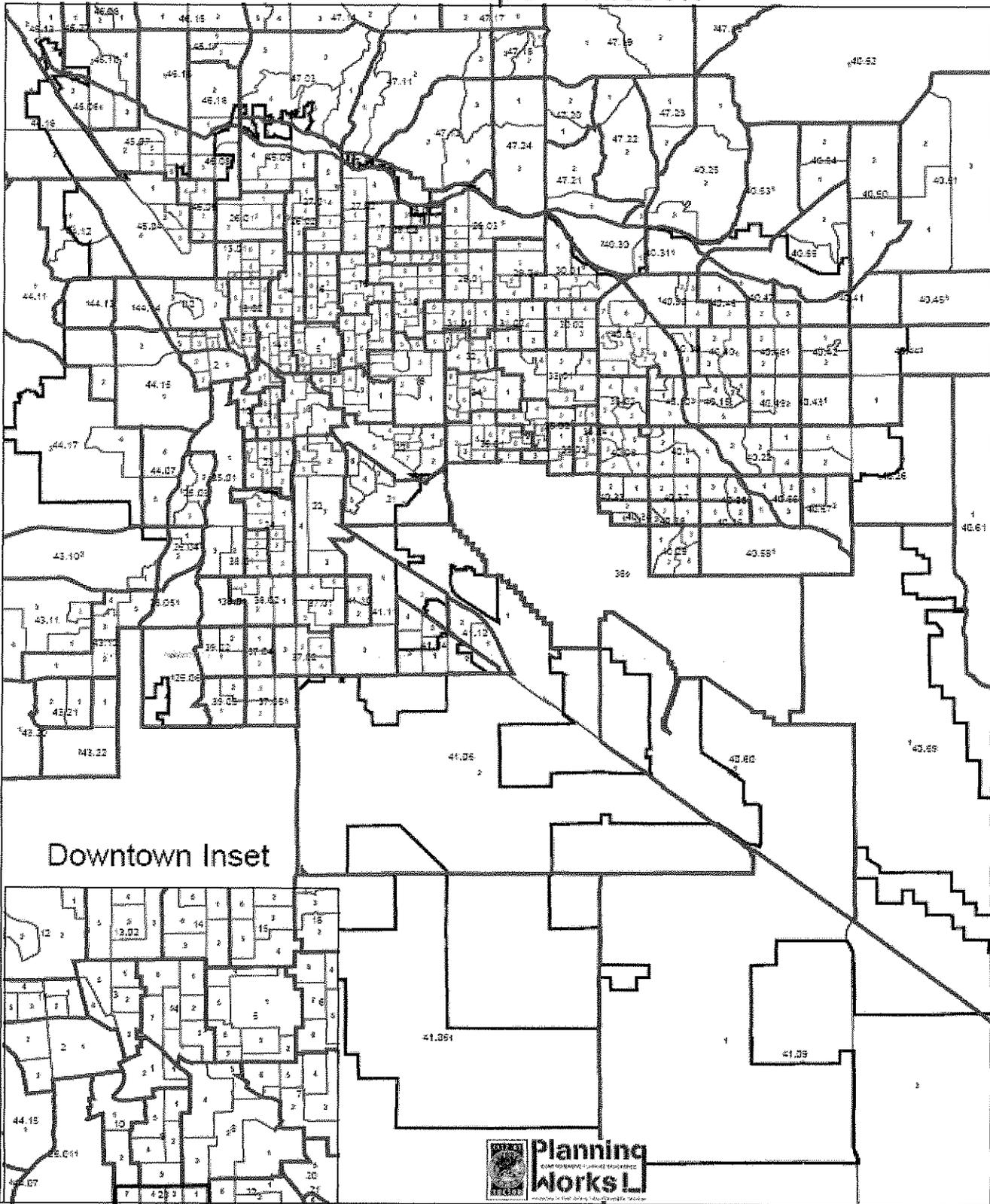
1. **Back to Basics Target Areas:** Each year the Mayor and Council select neighborhoods as Back to Basics target areas. This program is intended to rotate funding opportunities to all areas of the City. These neighborhoods receive an investment of CDBG and other funds to make improvements based on a neighborhood-driven prioritization process. Generally, these target neighborhoods overlay with minority concentration areas.
2. **Minority Concentration Targets:** The majority of the City's entitlement funding is directed to programs that are city-wide. This is intended to provide access to services to a broad spectrum of clients. Clients who are also residents from areas of minority concentration may receive services in an area of minority concentration or at a location where the service is offered outside of an area of minority concentration. In either case, entitlement funds are directed to benefit residents of minority concentration areas. See the stress map on page 28.
3. **Public Facilities:** The City funds these projects in areas designated low-income. Many of these projects are also in minority concentration areas. The City makes these investments to upgrade facilities in areas where there is a disproportionate need or a disparity in the facilities available to the surrounding area.

# Pima County Composite Stress Index Tucson Area



# 2000 Census Tracts with Block Groups - Tucson

10/2002



## **Institutional Structure**

1. *Describe actions taken during the last year to overcome gaps in institutional structures and enhance coordination.*

### **Program Year 3 CAPER Institutional Structure response:**

The Community Services Department has enacted a wide range of activities to enhance coordination and improve services to the community.

#### **Community Development Advisory Committee (CDAC)**

The CDAC is a Mayor & Council appointed committee that oversees the grant application process and provides valuable citizen participation to the CDBG funding process. CDAC makes Community Development funding recommendations to Mayor and Council.

#### **Human Services Plan and Review Committees**

Four Human Services Review Committees were convened to review proposals for Human Services, and make funding recommendations to the City Manager. These Committees convene on a two year cycle.

#### **Metropolitan Housing Commission**

The Metropolitan Housing Commission is a Mayor and Council appointed Commission that advises them on affordable housing issues. The Commission is comprised of 15 members from a diverse group of interests including: Neighborhood/Consumer Advocate; Developer/Builder/Designer; Real Estate/Finance; and Community Partners

#### **Tucson Housing Trust Fund Citizen Advisory Committee**

This group was formed by the Mayor and Council in 2007 in recognition of the need of additional affordable housing in Tucson. This group has 15 members from a variety of different backgrounds related to housing.

#### **Delegation of Authority – Environmental Reviews**

The Mayor and Council have delegated authority to the Director of Community Services, or her designee, to implement the review requirements for the National Environmental Policy Act.

#### **Delegation of Authority – Contracts**

The Mayor and Council have delegated authority to the Director of Community Services, or her designee, to execute contracts or other documents necessary to carry out activities listed in this document.

#### **Lending Institutions**

Many of the City's programs and initiatives utilize mortgages from local lending institutions. The City may ask lenders to provide loans directly to bankable low-income households for home purchase or home improvement loans; or to an organization or developer for a public facility or multi-family housing project. The City depends on the local implementation of federal Community Reinvestment Act (CRA) programs to successfully develop needed affordable housing.

## **City of Tucson and Pima County Consortium**

The consortium partners with various levels of government and other major funders, in policy development. In FY 2008, they entered into an agreement to authorize the City to operate a housing program on behalf of the County in order to provide financial assistance to families who reside in Pima County.

## **Public Planning Process**

The City has engaged the public in planning and programs through the designation of special advisory committees, comprised of individuals with diverse interests and perspectives in regard to key community issues. For example, the Mayor and Council appointed a citizen committee to work with the City on downtown revitalization and oversight of the code enforcement process.

The City is undertaking a major revitalization of its downtown and surrounding neighborhoods. The Rio Nuevo project will add new commercial, cultural, transportation and public facilities to the core of downtown. There is a plan to build up to 2,000 new housing units within a ten-year period. The City is engaged in a multi-level planning process that includes the development of neighborhood plans, special meetings and events to solicit public input, and consultation with national experts.

## **Code Consolidation and Enforcement**

The City has established a Neighborhood Protection Ordinance (NPO) that consolidates and enhances code provisions dealing with property maintenance. The City is currently planning to merge the Community Services Department with the Neighborhood Resources Department, which currently enforces the NPO.

## **Environmental Review Guidebook**

To facilitate project feasibility and expedite the contracting process, the City developed a local guidebook that establishes a streamlined process for reviewing proposed projects in accordance with the National Environmental Policy Act (NEPA).

## **Pro-Neighborhoods**

In an effort to provide resources to small projects that typically do not meet the criteria for entitlement funding, the City and County developed a multi-funded program called Pro-Neighborhoods. This program targets smaller, neighborhood-based needs like traffic calming devices and school-based activities for neighborhood residents.

## **Intragovernmental Coordination**

Public improvement projects are coordinated with numerous City departments, including: Parks and Recreation, Development Services, Neighborhood Services, Police, Fire, and Planning.

## **Industrial Development Authorities**

The City of Tucson and Pima County have Industrial Development Authorities (IDA). Through special bonding capacity, these organizations have financial resources for affordable housing development and public facility enhancements.

## Monitoring

1. Describe how and the frequency with which you monitored your activities.
2. Describe the results of your monitoring including any improvements.
3. Self Evaluation
  - a. Describe the effect programs have in solving neighborhood and community problems.
  - b. Describe progress in meeting priority needs and specific objectives and help make community's vision of the future a reality.
  - c. Describe how you provided decent housing and a suitable living environment and expanded economic opportunity principally for low and moderate-income persons.
  - d. Indicate any activities falling behind schedule.
  - e. Describe how activities and strategies made an impact on identified needs.
  - f. Identify indicators that would best describe the results.
  - g. Identify barriers that had a negative impact on fulfilling the strategies and overall vision.
  - h. Identify whether major goals are on target and discuss reasons for those that are not on target.
  - i. Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

### **Program Year 3 CAPER Monitoring response:**

#### **1. Monitoring Timeline**

As was noted in the FY2008 Annual Action Plan, program monitoring for CDBG and HOME regulatory compliance occurred on a continual basis during 2008.

#### **2. Monitoring Plan/Results**

The following is the City's current guidance relating to monitoring plans for both CDBG and HOME. Our strong commitment to the monitoring of our partnering agencies has resulted in stronger relationships, minimization of errors, and better product and service delivery throughout the community. Of particular note is our pre-contract audit requirement, whereby City audit staff review agencies' financial systems to insure that they have the capacity to successfully manage the awarded funds.

#### **Pre-Award Screening**

- Prior to award of funds, all subrecipient service providers received pre-contract assessments to assure that sufficient administrative and fiscal management systems were in place to successfully provide the service identified in the grant applications.
- During the RFP process, City staff met individually with agencies to evaluate other program capacity issues.

#### **Post-Award Monitoring**

- After funding approval, subrecipients received program orientation and technical assistance in setting up the necessary reporting mechanisms.
- Desk monitoring and technical assistance was provided on a continual basis as monthly billings were reviewed and processed.

City staff conducted Need and Risk Assessments on 100% of the contracts. City staff used the Monitoring HOME Program Performance model developed by HUD to ensure compliance with HOME rules and regulations. Public facility and infrastructure projects with Davis-Bacon requirements were implemented, administered and monitored in compliance with the appropriate statutes and regulations.

Annually, City staff holds an eligibility-training class for all funded agencies that manage low-income HOME rental units. The class is mandatory for all CHDO's that receive CHDO Operating Funds. The training includes how to conduct income eligibility in accordance with Section 8 guidelines, and explains what documents must be maintained in the eligibility file.

### **CDBG Monitoring**

It is the policy of the Community Services Department, Community Development Division, to monitor all subrecipient contracts on an annual basis. All subrecipients will, at a minimum, be monitored by means of an office desk-review utilizing a monitoring checklist appropriate for the program/project. Those subrecipients whose risk assessment is high (4 or more factors checked) will receive on-site monitoring. Those subrecipients whose risk assessment is medium (2 to 3 factors checked) will, time permitting, receive on-site monitoring, with those with the highest number of risk factors being a priority. Those subrecipients whose risk assessment is low (0 to 1 factors checked) will receive a desk-review monitoring. All subrecipients will receive on-site monitoring in the event it is requested by an authorized city, state or federal official. Additionally, the City may, at its discretion, perform a risk assessment of a subrecipient, and if the risk assessment warrants on-site monitoring, the City may perform same. All public facility projects will require an on-site visit prior to making final payment.

## HOME Monitoring

The City of Tucson monitors the following units to ensure that all of the HOME units meet the HOME Monitoring requirements as specified in 24 CFR Part 92.207.

<b>Rental Partnership Monitoring Frequency</b>		
<b>Project</b>	<b>Frequency</b>	<b># COT HOME Units</b>
1 St. Lukes in the Desert	Annual	5
2 MHC - 9 Home Contract	2 years	9
3 MHC - 11 Home Contract	2 years	11
4 Alamo Hotel	Annual	11
5 MacArthur Apartments	2 years	6
6 Winstel Terrace Apart.	Annual	19
7 New Beginnings PH 1	2 years	16
8 New Beginnings PH 2	2 years	24
9 Wings of Freedom	2 years	8
10 Casita Mia 5	3 years	2
11 Casitas Esperanzas Byas	2 years	8
12 Casa Bonita 1 & 2	2 years	4
13 Casita Mia 1 & 2	2 years	10
14 El Portal	2 years	19
15 Colores Del Sol	Annual	11
16 Talavera Apartments	Annual	11
17 Lee St - Fourplex	3 years	4
18 Mabel & Delano	2 years	8
19 Las Villas De Kino Phase 1	Annual	11
20 Las Villas De Kino Phase 2	Annual	11
21 Parkside Terrace Apts	Annual	11
22 Sahuaro Apartments	2 years	23
23 Miracle Square	2 years	22
24 Casa Bonita 3, 4 & 5	Annual	11
25 SAAF - E Jacinto/E19th St	2 years	13

### 3. Self-Evaluation

The overall goal of the Community Planning and Development programs identified in the Consolidated Plan is to develop viable communities by providing decent housing and a suitable living environment and expanding economic opportunities for low- and moderate-income persons. During FY 08, the City funded activities and implemented strategies that had a significant impact on achieving these goals. The charts contained in this report highlight our accomplishments, which include:

- homeownership opportunities for low-income families have increased;
- more rental units are available to low- and moderate-income individuals;
- housing rehabilitation goals have been exceeded;
- the homeless have a wide variety of programs designed to provide shelter, case management and counseling, and promote self-sufficiency;
- critically needed services are available community-wide; and
- public facility improvements are being made that will improve access to services.

The City of Tucson has continued to provide a continuum of services to address the variety of needs in the community. No major program changes are anticipated as a result of the 2008 accomplishments and production. There may be minimal shifts in resource allocation as leveraging options are identified.

There were no actions taken or omitted by the City that hindered the implementation of projects listed in the 2008 Annual Update to the Consolidated Plan.

There are no committed housing projects that are inordinately delayed. However, as a result of a significant increase in the cost of land and construction, a number of our agencies are seeking to leverage additional funds in order to keep the development process moving forward. The City had dedicated CDBG and HOME funds to support a near elderly tax credit rental project known as the Ghost Ranch, but they did not receive the tax credit allocation, so the owner intends to reapply to the State for new tax credits in the next round.

Some information reflected in the IDIS report is obsolete as of the printing of this document. This is partially because IDIS does not accommodate expenditures and activities for the month of June when many projects are completed and closed out in the City's 13<sup>th</sup> month accounting period (July).

#### **Lead-based Paint**

1. *Describe actions taken during the last year to evaluate and reduce lead-based paint hazards.*

#### **Program Year 3 CAPER Lead-based Paint response:**

Rehabilitation projects - The City follows strict HUD guidelines for testing and abatement of lead-based paint and other hazardous substances, and requires compliance for its contractors and subcontractors. Any structure built before 1978 which is proposed for rehabilitation under federal programs is tested for lead-based paint, as required by Subpart J of 24 CFR Part 35. Notices and requirements regarding testing and removal for lead-based paint are provided to program participants, contractors and project sponsors. The City of Tucson has private market,

licensed contractors who are trained in Lead Safe Work Practices, and are available to perform appropriate interim controls if lead-based paint has been identified

In FY2008, funds will be allocated for the Housing Rehab Collaborative Environmental Resources and Compliance Report. A portion of the funding will be used to train non-profit and city staff on federal compliance requirements. In addition, seminars dealing with asbestos, mold and healthy homes awareness will be held.

In September 2007, the city in partnership with 25 local agencies received a Lead Based Paint Hazard Control Grant Program award from HUD in the amount of \$3 million. The grant was awarded to the City and funds became available for implementation in January 2008.

## HOUSING

### Housing Needs

*\*Please also refer to the Housing Needs Table in the Needs.xls workbook.*

1. Describe Actions taken during the last year to foster and maintain affordable housing.

### **Program Year 3 CAPER Housing Needs response:**

The City of Tucson has worked on several fronts to preserve and develop affordable housing for low-income families in our community. The City has been successful and has exceeded set goals in areas including Assistance to Homeowners; New Homeownership Opportunities; Assistance to Persons with Special Needs; Public Services; Public Facilities and Neighborhood Revitalization.

With an annual goal of assisting 500 Homeowner households, the City exceeded this goal by developing 579 units. New Homeownership development exceeded the set goals by producing 239 units. In the area of special needs, some of the most vulnerable populations in our community, the City exceeded the goal of assisting 3,286 persons by assisting 4,266 special needs persons. In Public Facilities and Neighborhood Revitalization, the City met or exceeded these goals with the development of 12 facilities and 27 projects, respectively. In the Public Services area, our goal was to assist 33,370 persons annually. This past year, we exceeded that goal by assisting 49,920 persons.

### **SPECIFIC HOUSING OBJECTIVES**

1. Evaluate progress in meeting specific objective of providing affordable housing, including the number of extremely low-income, low-income, and moderate-income renter and owner households comparing actual accomplishments with proposed goals during the reporting period.
2. Evaluate progress in providing affordable housing that meets the Section 215 definition of affordable housing for rental and owner households comparing actual accomplishments with proposed goals during the reporting period.
3. Describe efforts to address "worst-case" housing needs and housing needs of persons with disabilities.

**Program Year 3 CAPER Specific Housing Objectives response:**

**1. Evaluate Progress**

The City's goals and targets were approved by the Mayor and Council, in the Consolidated Plan, and the Annual Action Plan. These goals and targets establish the City's overall objectives and outcome measures for affordable housing until 2010. The goals and targets were developed to plan for the needs of families, older residents, persons with disabilities, and low-income individuals.

The purpose of the goals is to establish a long-term vision of where the City wants to be, and to provide a quantitative way to measure its progress.

**2. Specific Goals and Accomplishments**

**Specific Housing Objectives and Accomplishments**

<b>Rental Housing Objectives</b>			
<b>Specific Objectives</b>	<b>Performance Measures</b>	<b>Goals</b>	<b>Actual</b>
Increase the supply of affordable rentals for families	Number of Units Produced:	100	4 complete 176 underway
Reduce the number of elderly persons who are cost burdened	Number of Units Produced:	50	63 complete 246 underway
Increase the supply of affordable rentals for special populations	Number of Units Produced:	40	8 complete 5 underway
Preserve affordable rental units	Number of Units Retained:	100	184

<b>Owner Housing Objectives</b>			
Increase the supply of affordable homeownership units	Number of Units Produced	65	31 sold 92 underway
Preserve existing housing stock	Number of Units Rehabilitated	500	579
Increase affordability through downpayment assistance	Number of Homeownership Assisted:	100	149 116
Lead Free Homes	Number of Units Assisted	20	2 complete 41 underway

Wherever possible, the City attracts additional resources by submitting grant applications and providing support to organizations that apply to competitive grant programs. The City has been successful in attracting grants to support agencies that provide housing and services. These include: The Affordable Housing Program of the Federal Home Loan Bank, State of Arizona HOME Program and Housing Trust Fund, Supportive Housing Program (SHP), HOPE VI program, and HOPE 3 programs. The City has contributed general funds to meet HOME program match requirements and for activities that support the homeless.

<b>Homeowners Assisted by Income</b>					
AGENCY NAME	PROJECT NAME	0-30%	31-50%	51-80%	81%+
<b>REHABILITATION</b>					
Chicanos Por La Causa	Housing Rehab Collaborative Rio Nuevo	0	1	0	0
Chicanos Por La Causa	Roof Replacement and Home Maintenance	2	3	3	0
City of Tucson/CSD	Below Market Interest Rate Program	4	12	15	0
City of Tucson/CSD	Deferred Loan Program	2	10	7	0
City of Tucson/CSD	Emergency Home Repair	7	17	13	0
City of Tucson/CSD	City Neighborhood Initiatives	1	11	16	0
City of Tucson/CSD	Back to Basics Rehabilitation Program	5	14	5	0
Community Home Repair Projects of AZ	City Minor Emergency Repair	239	15	2	0
DIRECT Center for Independence	Home Access Program	10	9	10	0
Old Pueblo Community Foundation	Rehabilitation	2	3	3	0
Pima Council on Aging	Elderly Home Repair	19	3	0	0
Rebuilding Together Tucson	Neighborhood Renovation	13	4	3	0
Rebuilding Together Tucson	Housing Rehab Collaborative Rio Nuevo	7	4	1	0
TMM Family Services	Housing Rehabilitation Program	3	2	5	0
Tucson Urban League	City Emergency Home Repair	16	12	1	0
Tucson Urban League	South Park Rehabilitation	2	1	0	0
<b>TOTAL</b>		<b>332</b>	<b>121</b>	<b>84</b>	<b>0</b>

<b>HOMEOWNERSHIP</b>					
Chicanos Por La Causa/CDBG	Down Payment Assistance Program	0	0	1	0
Family Housing Resources/CDBG	Ward 1 Down Payment Assistance Program	0	0	1	0
Old Pueblo Community Foundation/CDBG	Down Payment Assistance Program	0	0	0	0
TMM Family Services/CDBG	Midtown First Time Homeowners Program	0	0	2	2
Tucson Urban League/CDBG	Down Payment Assistance Program	0	0	10	0
Community Services Department	ADDI/HOME	0	0	9	0
Community Services Department	ADDI PLUS/HOME	0	1	4	0
Community Services Department	HAP/HOME	0	3	46	0
Pima County	ADDI/HOME	0	1	3	0
Pima County	HAP/HOME	0	7	36	0
<b>TOTAL</b>		<b>0</b>	<b>12</b>	<b>112</b>	<b>2</b>

### **3. "Worst Case" Housing Needs:**

Generally, this population is unable to significantly contribute to the cost of housing themselves. In these instances, boutique programs such as the SHP funded Bridges Program and other SHP and ESG funded programs are designed to meet the needs of this population.

The City addresses the "worst case" dilapidated housing structures through its Vacant and Neglected Structures (VANS) program. This program targets unoccupied structures that are a blight in the community, citing owners under the Neighborhood Preservation Ordinance. In FY 2008, 11 units were demolished as a result of this effort.

### **Public Housing Strategy**

- 1. Describe actions taken during the last year to improve public housing and resident initiatives.*

### **Program Year 3 CAPER Public Housing Strategy response:**

1. The City has several initiatives that provide opportunities to public housing residents.

#### **Family Self-Sufficiency Program**

City of Tucson's Family Self-Sufficiency Program seeks to assist Section 8 and public housing residents move from dependency on public assistance programs to independence. Provision of case management services, educational opportunities, job training opportunities, employment assistance, and the use of an escrow savings account are program components designed to help participants to achieve goals.

#### **ROSS (Resident Opportunity for Self-Sufficiency) Program**

The ROSS program provides public housing residents with supportive services, resident empowerment activities, and assistance in becoming economically self-sufficient. The ROSS program offers opportunities to help residents set goals and to overcome barriers. Residents get help to obtain their GED, to take ESL classes, to obtain basic education or career training, to find a new career, to repair their credit rating, to develop a savings plan, and purchase their own home.

#### **Tucson Learn2\$ave Program**

Funded jointly by the U.S. Department of Health and Human Services and the United Way of Tucson and Southern Arizona, this Individual Development Account (IDA) program is designed to develop life-long saving habits and promote first-time homeownership. Under this program, participants' savings accounts are matched on a \$4-to-\$1 basis, up to a maximum award of \$4,000. In addition, the Federal Home Loan Bank of San Francisco and the Arizona Federal Credit Union offer an additional subsidy of \$3-to-\$1, with a maximum award of \$15,000.

#### **MLK HOPE VI**

The City was awarded \$9.8 million in HOPE VI funding for the development of public housing units at a mixed use, mixed income, pedestrian friendly development in Tucson's downtown. Sixty eight (68) units will be built downtown and 28 new town home style units will be built on the west side of Tucson at Silverbell.

### **Capital Fund**

Annually, the City is awarded approximately \$1,600,000 in capital funds to be used to maintain and improve our public housing inventory.

### **Zone Operations**

The City's 1,505 public housing units are managed by property management offices that are responsible for the day to day operations of the properties. Each office has a property manager, a property management assistant, a routine maintenance technician, and a maintenance crew responsible for renovating vacant units. Each team is also responsible for rent collection, routine maintenance, annual lease certifications, re-occupancy, and lease enforcement. Each team is responsible for 250-400 units.

### **Barriers to Affordable Housing**

1. *Describe actions taken during the last year to eliminate barriers to affordable housing.*

### **Program Year 3 CAPER Barriers to Affordable Housing response:**

#### **Bilingual Material**

A large percentage of low-income residents in Pima County are Spanish speaking. Materials and advertisements promoting countywide homeownership programs are printed in English and Spanish.

#### **Incentives for Private Developers**

The City provides incentives to non-profit and for-profit developers to expand their affordable housing production. In addition, the City has leveraged land and provided below-market financing for affordable housing development.

#### **Don't Borrow Trouble**

This project is designed to raise public awareness of predatory lending issues and to provide referral services to qualified credit counselors

#### **Analysis of Impediments and other Fair Housing Activities**

A HUD mandated program, the Analysis of Impediments strives to eliminate all forms of illegal housing discrimination and to actively promote fair housing activities for all. An updated version of this Plan was completed in FY2004.

#### **Language Assistance Plan for Limited English Proficient Persons**

In January 2007, HUD issued final guidance relating to providing meaningful access to persons who have limited English proficiency. The City of Tucson has developed a Language Assessment Plan to address the needs and requirements of those clients who are not fluent in English.

## **HOME/American Dream Down Payment Initiative (ADDI)**

1. *Assessment of Relationship of HOME Funds to Goals and Objectives*
  - a. *Evaluate progress made toward meeting goals for providing affordable housing using HOME funds, including the number and types of households served.*
2. *HOME Match Report*
  - a. *Use HOME Match Report HUD-40107-A to report on match contributions for the period covered by the Consolidated Plan program year.*
3. *HOME MBE and WBE Report*
  - a. *Use Part III of HUD Form 40107 to report contracts and subcontracts with Minority Business Enterprises (MBEs) and Women's Business Enterprises (WBEs).*
4. *Assessments*
  - a. *Detail results of on-site inspections of rental housing.*
  - b. *Describe the HOME jurisdiction's affirmative marketing actions.*
  - c. *Describe outreach to minority and women owned businesses.*

### **Program Year 3 CAPER HOME/ADDI response:**

#### **1. Relationship of HOME Funds to Goals and Objectives:**

In FY2008, Tucson received \$4,133,827 in HOME Investment Partnerships (HOME) Program funds, and \$82,282 from the HOME American Dream Downpayment Initiative (ADDI). ADDI funds are available to assist qualified low-income, first-time homebuyers with downpayment assistance. An additional \$248,875 was available from HOME program income.

The Five-Year Consolidated Plan's specific objectives include housing rehabilitation, homeownership opportunities and transitional and rental housing development.

The following chart illustrates how HOME funds were utilized to implement this strategy.

<b>Programs</b>	<b>Home Expenditures</b>	<b># Units</b>	<b>% AMI</b>	<b>Ethnicity</b>
Homeownership	\$1,311,186	113 30 complete 83 underway	7- 30%-50% 23 - 50%-80%	14 Hispanic 0 - Asian 0 - Native Amer. 1 - Black 29 - White
Downpayment Assistance (Includes both City and County)	\$1,637,905	110	12 - 30%-50% 98 - 50%-80%	71 - Hispanic 0 - Asian 2 - Native Amer. 9- Black 99 - White
Rental	\$1,264,289	67 34 HOME 33 Non HOME	0 - 30%-50% 34 - 50%-60% 0 - 60%-80%	14 - Hispanic 2 - Black 26 - White 2 - Other
Rehabilitation	\$266,426	19	2 - 0% - 30% 10 - 30%-50% 7 - 50% - 80%	8 - Hispanic 1 - Asian 8 - White 2 - Black
<b>Total</b>	<b>\$4,479,806</b>	<b>309</b>		

The 2008 accomplishments for projects sponsored by Community Housing Development Organizations (CHDO's) are included in the homeownership totals, including CHDO Project and Operating expenses.

## **2. HOME MATCH REPORT**

The Consortium met and exceeded the 25% mandated HOME program match requirement.







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U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT  
OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT  
INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM

HOME MATCHING LIABILITY REPORT  
TUCSON CONSORTIUM, AZ

FISCAL YEAR	MATCH PERCENT	TOTAL DISBURSEMENTS	DISBURSEMENTS REQUIRING MATCH	MATCH LIABILITY AMOUNT
1998	25.0%	2,315,078.76	1,084,752.42	271,188.10
1999	25.0%	5,863,205.06	3,802,149.07	950,537.26
2000	25.0%	4,883,608.00	3,163,799.52	790,949.88
2001	25.0%	4,950,872.84	3,887,322.80	971,830.70
2002	25.0%	5,488,795.29	3,373,705.70	843,426.42
2003	25.0%	5,367,333.42	3,925,229.89	981,307.47
2004	25.0%	4,112,175.82	3,300,315.75	825,078.93
2005	25.0%	4,104,881.53	2,628,233.97	657,058.49
2006	25.0%	4,170,576.49	2,585,049.57	646,262.39
2007	25.0%	3,250,898.86	1,945,009.16	486,252.29

### 3. HOME Minority and Women-Owned Business

The City has developed a Minority and Women-Owned Business Enterprise Program to ensure full and equitable economic opportunities to persons and businesses that compete for business with the City of Tucson, including minority-owned business enterprises and woman-owned business enterprises.

Following this section is the City's Annual Minority Business Enterprises and Women Owned Enterprises report for FY2008.

The following remedies are employed by the City of Tucson to address marketplace discrimination against minority (MBE) and women-owned (WBE) businesses:

- Consultation with new or developing businesses
- Certification of minority and women-owned businesses
- Publication and distribution of a MBE/WBE Directory
- Notification of MBEs and WBEs of Invitation for Bids (IFB) and Requests for Proposals (RFP) relating to construction, procurement and professional services
- Holding of city construction project plans for use by MBEs and WBEs
- Development and execution of seminars
- Conducting outreach activities to recruit MBEs and WBEs into the city purchasing process, including workshops for small businesses and publications describing the city's purchasing process
- Providing assistance with purchasing procedures and policies
- Monitoring of purchasing efforts to ensure MBE/WBE access to the process

In 2008, the HOME program awarded contracts to 1 business, of which 0 were minority owned, resulting in 38 subcontracts, of which 2 were minority owned. Of the 1 primary contracts awarded, 0 were awarded to women owned businesses, resulting in an addition 2 women owned business subcontractors.

In addition, the City has encouraged minority participation in HOPE VI activities through a Section 3 Outreach Program. This program provides employment opportunities to low-income and project-area residents, and is supplemented by a commitment of funds for education and training.

# Annual Performance Report HOME Program

U.S. Department of Housing  
and Urban Development  
Office of Community Planning  
and Development

OMB Approval No. 2506-0171  
(exp. 8/31/2009)

Public reporting burden for this collection of information is estimated to average 2.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

The HOME statute imposes a significant number of data collection and reporting requirements. This includes information on assisted properties, on the owners or tenants of the properties, and on other programmatic areas. The information will be used: 1) to assist HOME participants in managing their programs; 2) to track performance of participants in meeting fund commitment and expenditure deadlines; 3) to permit HUD to determine whether each participant meets the HOME statutory income targeting and affordability requirements; and 4) to permit HUD to determine compliance with other statutory and regulatory program requirements. This data collection is authorized under Title II of the Cranston-Gonzalez National Affordable Housing Act or related authorities. Access to Federal grant funds is contingent on the reporting of certain project-specific data elements. Records of information collected will be maintained by the recipients of the assistance. Information on activities and expenditures of grant funds is public information and is generally available for disclosure. Recipients are responsible for ensuring confidentiality when public disclosure is not required.

This form is intended to collect numeric data to be aggregated nationally as a complement to data collected through the Cash and Management Information (C/MI) System. Participants should enter the reporting period in the first block. The reporting period is October 1 to September 30. Instructions are included for each section if further explanation is needed.

Submit this form on or before December 31.	This report is for period (mm/dd/yyyy)		Date Submitted (mm/dd/yyyy)
Send one copy to the appropriate HUD Field Office and one copy to: HOME Program, Rm 7176, 451 7th Street, S.W., Washington D.C. 20410	Starting	Ending	
	7/1/07	6/30/08	9/24/08

## Part I Participant Identification

1. Participant Number CD 040229	2. Participant Name CITY OF TUCSON - COMMUNITY SERVICES DEPARTMENT		
3. Name of Person completing this report ANA LILIA ZAZUETA		4. Phone Number (include Area Code) 520-837-5376	
5. Address 310 N COMMERCE PARK LOOP	6. City TUCSON	7. State AZ	8. Zip Code 85745

## Part II Program Income

Enter the following program income amounts for the reporting period: in block 1, enter the balance on hand at the beginning; in block 2, enter the amount generated; in block 3, enter the amount expended; and in block 4, enter the amount for Tenant-Based rental Assistance.

1. Balance on hand at Beginning of Reporting Period	2. Amount received during Reporting Period	3. Total amount expended during Reporting Period	4. Amount expended for Tenant-Based Rental Assistance	5. Balance on hand at end of Reporting Period (1 + 2 - 3) = 5
	248,875	248,875		

## Part III Minority Business Enterprises (MBE) and Women Business Enterprises (WBE)

In the table below, indicate the number and dollar value of contracts for HOME projects completed during the reporting period.

	a. Total	Minority Business Enterprises (MBE)			f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	
<b>A. Contracts</b>					
1. Number	1				1
2. Dollar Amount	6,120,187				6,120,187
<b>B. Sub-Contracts</b>					
1. Number	38			2	36
2. Dollar Amount	4,410,805			438,304	3,972,501
	a. Total	b. Women Business Enterprises (WBE)	c. Male		
<b>C. Contracts</b>					
1. Number	1				
2. Dollar Amount	6,120,187				
<b>D. Sub-Contracts</b>					
1. Number	38	2	36		
2. Dollar Amounts	4,410,805	359,502	4,051,303		

**Part IV Minority Owners of Rental Property**

In the table below, indicate the number of HOME assisted rental property owners and the total dollar amount of HOME funds in these rental properties assisted during the reporting period.

	a. Total	Minority Property Owners				f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
1. Number						
2. Dollar Amount						

**Part V Relocation and Real Property Acquisition**

Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition. The data provided should reflect only displacements and acquisitions occurring during the reporting period.

	a. Number	b. Cost
1. Parcels Acquired		
2. Businesses Displaced		
3. Nonprofit Organizations Displaced		
4. Households Temporarily Relocated, not Displaced		

Households Displaced	a. Total	Minority Business Enterprises (MBE)				f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
5. Households Displaced - Number						
6. Households Displaced - Cost						

#### 4. Inspections of HOME-Assisted Units

The City has developed a compliance-monitoring plan and has completed on-site monitoring and inspections of 242 completed rental units. Minor discrepancies were found, i.e. incomes not calculated correctly (not resulting in anyone being over income), missing documentation required by the City of Tucson, and use of an incorrect utility allowance, and incorrect lease terms. Minor problems were found during the unit HQS inspections. Problems had been corrected within 30 days.

Monitoring efforts focus on ensuring compliance with affirmative marketing requirements of the HOME program. Monitoring will continue on a routine basis. The City has developed a complete HOME Program Policies and Procedures Manual. This manual includes the Monitoring Plan, as well as an Affirmative Marketing Plan.

##### **Affirmative Marketing and Outreach**

This is a proactive strategy to reach the broadest market of eligible clients for a particular program or service. Both the City and the County endorse and implement affirmative marketing policies.

The City and County promote affirmative marketing policies through the following:

- Notifying the public, property owners, and potential applicants of the local affirmative marketing policy.
- Publishing program announcements in newspapers of general circulation.
- Publishing program summaries that are designed to solicit applications from eligible target groups
- Displaying the equal opportunity slogan and logo in all advertisements and announcements
- Translating program notices and information into other languages.
- Direct mailing translated (English to Spanish) program materials to Spanish speaking residents
- Direct mailing program material to organizations serving the handicapped.
- Requiring organizations participating in City and County contracts to practice the affirmative marketing policy in their advertising

## HOMELESS

### Homeless Needs

*\*Please also refer to the Homeless Needs Table in the Needs.xls workbook.*

1. *Identify actions taken to address needs of homeless persons.*
2. *Identify actions to help homeless persons make the transition to permanent housing and independent living.*
3. *Identify new Federal resources obtained from Homeless SuperNOFA.*

#### **Program Year 3 CAPER Homeless Needs response:**

##### **1. Actions Taken to Address Needs of the Homeless**

The City's Continuum of Care for the Homeless is a locally developed needs assessment and strategy that illustrates the network of services available to assist the homeless population. This section identifies actions taken during FY08 to provide this continuum of care for the

homeless and persons with special needs, and indicates that the City exceeded the Consolidated Plan goal of 8,843 individuals assisted.

During FY 2008, the City committed CDBG, ESG, and City General funds in the amount of \$1,335,646 on programs for the homeless. These programs served approximately 7 shelters. Specific projects supported during FY 2008 are listed below. The goals of these projects are to prevent homelessness and assist individuals and families find permanent housing and regain self-sufficiency.

**Projects that Serve the Homeless**

<b>AGENCY</b>	<b>PROJECT</b>	<b>CDBG</b>	<b>ESG</b>	<b>General Fund</b>
Brewster Center Domestic Violence Services, Inc.	Domestic Violence Shelter Services	\$150,000		
Brewster Center Domestic Violence Services, Inc.	Domestic Violence Advocacy Services			\$66,578
Interfaith Coalition for the Homeless	TPCH Planning	\$30,000		
Interfaith Coalition for the Homeless	Winter Shelter Program			\$30,000
Open-INN, Inc.	Crisis Assistance and Shelter		\$101,602	
Open-INN, Inc.	Transitional Apartment Living Program			\$35,685
Our Family Services, Inc	Domestic Violence Services			\$80,600
Primavera Foundation	Primavera Emergency Services	\$102,284	\$45,418	
Primavera Foundation	Primavera WORKS	\$100,797		\$30,000
RISE, Inc.	Toole Service Site	\$58,367		
Salvation Army, The	Family Services Emergency Assistance Program	\$12,194	\$27,407	
TMM Family Services	Family Journey Transitional Housing		\$35,701	
Travelers Aid Society of Tucson	Housing for Homeless People with Disabilities			\$59,000
Travelers Aid Society of Tucson, Inc.	Emergency Shelter Services	\$75,600		
Travelers Aid Society of Tucson, Inc.	Crisis Emergency Services	\$97,413	\$50,000	
Travelers Aid Society of Tucson, Inc.	Women in Transition Program			\$41,000
Tucson Centers for Women and Children	Domestic Violence Services			\$65,000

Wingspan	Growing up Proud and Strong			\$31,000
Youth on their Own	Special needs			\$40,000
<b>Total</b>		<b>\$626,655</b>	<b>\$260,128</b>	<b>\$478,863</b>

## 2. Actions Taken to Promote Independent Living

### Independent Living Programs:

Open Inn, Inc. - Shelter and Transitional Housing  
 Primavera Foundation - Transitional Housing - Women In Transition  
 Primavera Foundation - Housing for Homeless People with Disabilities  
 TMM Family Services, Inc. - Family Journey Transitional Housing

## 3. Federal Resources obtained from Homeless SuperNOFA.

Total Continuum of Care for Tucson/Pima County is \$6,410,805

### Specific Homeless Prevention Elements

1. *Identify actions taken to prevent homelessness.*

### Program Year 3 CAPER Specific Housing Prevention Elements response:

Prevention services include programs aimed at keeping people in their homes by providing rent and mortgage assistance, utility payment assistance to prevent eviction, case management, housing counseling, landlord/tenant mediation/legal services, and behavioral health services, Information & Referral services, income maintenance programs and food stamps, job training and placement, and guardianship/ representative payee. In addition, prevention programs include supportive education about an owner's/landlord's specific requirements, and information on tenants' rights and obligations under Arizona law.

### Homeless Prevention programs:

The Salvation Army – Family Services Emergency Prevention Program  
 Primavera Foundation – Crisis Emergency Services

### Emergency Shelter Grants (ESG)

1. *Identify actions to address emergency shelter and transitional housing needs of homeless individuals and families (including significant subpopulations such as those living on the streets).*
2. *Assessment of Relationship of ESG Funds to Goals and Objectives*
  - a. *Evaluate progress made in using ESG funds to address homeless and homeless prevention needs, goals, and specific objectives established in the Consolidated Plan.*
  - b. *Detail how ESG projects are related to implementation of comprehensive homeless planning strategy, including the number and types of individuals and persons in households served with ESG funds.*
3. *Matching Resources*
  - a. *Provide specific sources and amounts of new funding used to meet match as required by 42 USC 11375(a)(1), including cash resources, grants, and staff salaries, as well as in-*

*kind contributions such as the value of a building or lease, donated materials, or volunteer time.*

4. *State Method of Distribution*
  - a. *States must describe their method of distribution and how it rated and selected its local government agencies and private nonprofit organizations acting as subrecipients.*
5. *Activity and Beneficiary Data*
  - a. *Completion of attached Emergency Shelter Grant Program Performance Chart or other reports showing ESGP expenditures by type of activity. Also describe any problems in collecting, reporting, and evaluating the reliability of this information.*
  - b. *Homeless Discharge Coordination*
    - i. *As part of the government developing and implementing a homeless discharge coordination policy, ESG homeless prevention funds may be used to assist very-low income individuals and families at risk of becoming homeless after being released from publicly funded institutions such as health care facilities, foster care or other youth facilities, or corrections institutions or programs.*
  - c. *Explain how your government is instituting a homeless discharge coordination policy, and how ESG homeless prevention funds are being used in this effort.*

## **Program Year 3 CAPER ESG response:**

### **1. Actions to Address Emergency Shelter and Transitional Housing Needs**

Emergency shelter programs are committed to directing clients seeking shelter or a meal toward more permanent solutions through the community's homeless services network. Many of the providers in our community have begun utilizing the Homeless Management Information System (HMIS) to further their efforts. A glitch in the service provision of HMIS resulted in many agencies lack of participation in HMIS in FY2008, however, Pima County has now stepped forward to facilitate the HMIS for the Continuum of Care.

Transitional Housing programs seek to empower homeless participants by providing affordable rental housing, combined with case management services, drug and substance abuse counseling, and job training and placement services. Services are tailored to meet the needs of each individual household. Transitional programs work to prepare participants for their transition to permanent housing once income sources have been identified and increased, and community services and support networks have been secured.

### **2. Assessment of Relationship of ESG funds to Goals and Objectives**

The City's goal was to increase transitional beds. However, because funding has remained level, we have been unable to increase the supply.

### **3. ESG Program Match**

The ESG Program has a dollar for dollar match requirement. In FY2008, the City of Tucson exceeded the requirements for this program by \$154,431. Sources of match funding are listed in the following chart.

<b>Agency</b>	<b>Local Government</b>	<b>Private</b>	<b>Fees/Program Income</b>	<b>Other Federal</b>	<b>Total</b>
Open Inn, Inc.		\$5,000		\$113,713	\$118,713
Primavera Foundation, Inc.	\$190,078	\$59,953			\$250,031
The Salvation Army	\$12,194	\$28,419			\$40,613
TMM Family Services		\$27,093	\$21,800		\$48,893
<b>TOTAL ESG MATCH</b>					<b>\$428,250</b>

#### **4. Stated Method of Distribution**

The City advertised fiscal year 2008 funding levels and priorities in the Request for Proposals (RFP). Agencies submitted RFPs, which were reviewed by a City Manager-appointed committee. The City Manager's funding recommendations were adopted by the Mayor and Council as part of the City's annual update to the Consolidated Plan.

#### **5. Activity and Beneficiary Data**

All contracts became effective on July 1, 2008, and agencies have until December 31, 2009, to expend funds.

Agency	Project	Prevention	Essential Services	Maint. & Operat.	Total Grant	#'s Served
Open-INN, Inc.	Crisis Assistance and Shelter		\$42,407	\$59,195	\$101,602	151
Primavera Foundation, Inc.	Primavera Emergency Services			\$45,418	\$45,418	1048
Salvation Army, The	Family Services Emergency Prevention Program	\$27,407			\$27,407	133
TMM Family Services	Family Journey Transitional Housing			\$35,701	\$35,701	222
Primavera Foundation	TA Crisis Emergency Services	\$25,000			\$25,000	1319
Primavera Foundation	TA Emergency Shelter Services	\$25,000			\$25,000	3167
	<b>TOTAL</b>	<b>\$77,407</b>	<b>\$42,407</b>	<b>\$140,314</b>	<b>\$260,128</b>	<b>6040</b>

## Homeless Discharge Coordination

The Discharge Planning Committee of Tucson Planning Council for the Homeless developed discharge plans with all hospitals, jails, prisons and other institutions in Tucson/Pima County to address discharge procedures for homeless patients. The Plan is provided all hospital, jail and prison discharge planning staff with information about accessibility to all homeless shelters, entry requirements, contact names of shelter staff, and addresses.

## COMMUNITY DEVELOPMENT

### Community Development

*\*Please also refer to the Community Development Table in the Needs.xls workbook.*

1. *Assessment of Relationship of CDBG Funds to Goals and Objectives*
  - a. *Assess use of CDBG funds in relation to the priorities, needs, goals, and specific objectives in the Consolidated Plan, particularly the highest priority activities.*
  - b. *Evaluate progress made toward meeting goals for providing affordable housing using CDBG funds, including the number and types of households served.*
  - c. *Indicate the extent to which CDBG funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons.*
2. *Changes in Program Objectives*

- a. *Identify the nature of and the reasons for any changes in program objectives and how the jurisdiction would change its program as a result of its experiences.*
3. *Assessment of Efforts in Carrying Out Planned Actions*
  - a. *Indicate how grantee pursued all resources indicated in the Consolidated Plan.*
  - b. *Indicate how grantee provided certifications of consistency in a fair and impartial manner.*
  - c. *Indicate how grantee did not hinder Consolidated Plan implementation by action or willful inaction.*
4. *For Funds Not Used for National Objectives*
  - a. *Indicate how use of CDBG funds did not meet national objectives.*
  - b. *Indicate how did not comply with overall benefit certification.*
5. *Anti-displacement and Relocation – for activities that involve acquisition, rehabilitation or demolition of occupied real property*
  - a. *Describe steps actually taken to minimize the amount of displacement resulting from the CDBG-assisted activities.*
  - b. *Describe steps taken to identify households, businesses, farms or nonprofit organizations who occupied properties subject to the Uniform Relocation Act or Section 104(d) of the Housing and Community Development Act of 1974, as amended, and whether or not they were displaced, and the nature of their needs and preferences.*
  - c. *Describe steps taken to ensure the timely issuance of information notices to displaced households, businesses, farms, or nonprofit organizations.*
6. *Low/Mod Job Activities – for economic development activities undertaken where jobs were made available but not taken by low- or moderate-income persons*
  - a. *Describe actions taken by grantee and businesses to ensure first consideration was or will be given to low/mod persons.*
  - b. *List by job title of all the permanent jobs created/retained and those that were made available to low/mod persons.*
  - c. *If any of jobs claimed as being available to low/mod persons require special skill, work experience, or education, provide a description of steps being taken or that will be taken to provide such skills, experience, or education.*
7. *Low/Mod Limited Clientele Activities – for activities not falling within one of the categories of presumed limited clientele low and moderate income benefit*
  - a. *Describe how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of whom are low- and moderate-income.*
8. *Program income received*
  - a. *Detail the amount of program income reported that was returned to each individual revolving fund, e.g., housing rehabilitation, economic development, or other type of revolving fund.*
  - b. *Detail the amount repaid on each float-funded activity.*
  - c. *Detail all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other.*
  - d. *Detail the amount of income received from the sale of property by parcel.*
9. *Prior period adjustments – where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:*
  - a. *The activity name and number as shown in IDIS;*
  - b. *The program year(s) in which the expenditure(s) for the disallowed activity(ies) was reported;*
  - c. *The amount returned to line-of-credit or program account; and*
  - d. *Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.*
10. *Loans and other receivables*

- a. List the principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.
  - b. List the total number of other loans outstanding and the principal balance owed as of the end of the reporting period.
  - c. List separately the total number of outstanding loans that are deferred or forgivable, the principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.
  - d. Detail the total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.
  - e. Provide a List of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.
11. Lump sum agreements
- a. Provide the name of the financial institution.
  - b. Provide the date the funds were deposited.
  - c. Provide the date the use of funds commenced.
  - d. Provide the percentage of funds disbursed within 180 days of deposit in the institution.
12. Housing Rehabilitation – for each type of rehabilitation program for which projects/units were reported as completed during the program year
- a. Identify the type of program and number of projects/units completed for each program.
  - b. Provide the total CDBG funds involved in the program.
  - c. Detail other public and private funds involved in the project.
13. Neighborhood Revitalization Strategies – for grantees that have HUD-approved neighborhood revitalization strategies
- a. Describe progress against benchmarks for the program year. For grantees with Federally-designated EZs or ECs that received HUD approval for a neighborhood revitalization strategy, reports that are required as part of the EZ/EC process shall suffice for purposes of reporting progress.

**Program Year 3 CAPER Community Development response:**

**1. CDBG CONSOLIDATED PLAN –  
PRIORITIES, NEEDS, GOALS AND OBJECTIVES**

During FY2008, the City of Tucson received \$6,331,206 in CDBG entitlement funds.

Families assisted under the federal regulation for “direct benefit” are qualified through an application process. Eligibility is based on documentation of total household income for the previous year. Typically, tax returns, pay check stubs, benefit letters and evidence of assets are used to document eligibility under the HUD guidelines. This information must be maintained in project files.

Activities selected for funding met the goals of the highest priorities listed in the Five-Year Consolidated Plan, which primarily focused on housing.

The following chart illustrates how CDBG funds were used to meet the objectives stated in the Consolidated Plan.

## Consolidated Plan Objectives and CDBG Funds

<b>Housing Activities</b>	<b>CDBG Funds</b>
Homebuyers (Down Payment Assistance)	\$ 190,510
Homeowners (Rehabilitation Activities)	\$2,427,730
Rental Development	\$ 152,655
<b>Neighborhood Revitalization</b>	<b>CDBG Funds</b>
Public/Agency Facilities	\$ 323,270
Back to Basics Projects	\$ 826,903
<b>Public Services</b>	<b>CDBG Funds</b>
Public Services	\$ 1,000,670
<b>Planning Activities</b>	<b>CDBG Funds</b>
Planning Activities (includes Fair Housing)	\$ 92,059
<b>Economic Development Activities</b>	<b>CDBG Funds</b>
Economic Development	\$ 62,985
<b>TOTAL ALL CDBG</b>	<b>\$5,076,782</b>

### 2. Changes in Program Objectives

There were no changes in the CDBG program objectives during FY2008.

### 3. Efforts to Carry Out Annual Action Plan Activities

The City of Tucson has ensured consistency with Consolidated Plan priorities and with HUD programs by providing certifications of consistency in a fair and impartial manner. The Consortium requires that agencies provide copies of their applications for funding, or a detailed executive summary before a letter of consistency is granted.

In FY08, the following agencies received Consolidated Plan Certifications for the proposed projects:

Agency	Federal Program	Activity
Primavera Foundation	Housing Counseling	Housing
Pima Community College	Housing Counseling	Housing
Family Housing Resources	Housing Counseling	Housing
Primavera Foundation	Emergency Shelter	Housing
Community Partnership of Southern Arizona	HUD 811	Housing
Ghost Ranch Lodge	LIHTC	Housing
Depot Plaza	LIHTC	Housing
Vida Serena	LIHTC	Housing
Catalina Village	LIHTC	Housing
One West	LIHTC	Housing

#### **4. CDBG Funds Not Used to Meet Specified National Objectives**

All Community Development Block Grant funds were utilized exclusively to achieve specific national objectives.

#### **5. Relocation Due to Acquisition, Rehabilitation or Demolition of occupied Real Property**

No permanent relocation occurred during FY2008 as a result of acquisition, rehabilitation or demolition activities. The City acquires vacant buildings for its affordable housing programs. The City's priority is to minimize displacement through the use of unoccupied properties. However, the City has a set of procedures to facilitate relocation and provide benefits to families as necessary. These procedures outline noticing requirements, relocation assistance, eligibility determination calculations, estimated costs for relocation and the timeline for implementing each step.

The City has implemented an emergency safety net program for families that are homeless or displaced from their housing. This program coordinates the efforts of homeless shelter and service providers, building safety code inspectors, and organizations providing affordable housing units.

#### **6. Economic Development Activities**

The Business Development Finance Corporation revolving loan, had a balance of \$1,363,889 and created 5 jobs for low/mod individuals. The revolving loan fund generated \$117,306 of program income to be sent to the US Treasury.

## 7. Limited Clientele

City projects served a total of 49,755 low- and moderate-income limited clientele.

## 8. Program Income

The program income identified below was earned during FY2008 and was expended as soon as it was received. The full amount of CDBG program income received was entered into the Integrated Disbursements and Information System (IDIS), and was drawn down against expenditures attributable to FY08. The City did not have any excess program income on hand on June 30, 2008.

Source	Amount
CDBG	\$135,450
HOME	\$248,857
<b>Total</b>	<b>\$384,325</b>

## 9. Prior Period Adjustments - None

## 10. Loans and other Receivables – Not applicable

## 11. Lump-Sum Agreements – Not Applicable

## 12. Housing Rehabilitation

Program	Funds Expended	Accomplishments
Housing Rehabilitation	\$775,176	94 units
Emergency Rehabilitation	\$ 471,452	37 units
Housing Rehab Collaborative	\$1,181,102	399 units
City Deferred Loan Program	\$ 266,426	14 units
PCOA – Older Americans Act	\$160,583	30 units
<b>TOTAL</b>	<b>\$2,854,739</b>	<b>579 units</b>

## 13. Neighborhood Revitalization Strategies – No designated NRSAs.

### Antipoverty Strategy

1. Describe actions taken during the last year to reduce the number of persons living below the poverty level.

## Program Year 3 CAPER Antipoverty Strategy response:

### 1. ANTIPOVERTY STRATEGY

Most activities undertaken with CDBG, HOME, ADDI, ESG and HOPWA funds are efforts to reduce the number of persons living in poverty and improve the quality of life for city residents. The City will continue to support emergency assistance programs, and a variety of other support services that are used by low-income households to obtain basic necessities. The main goal is to prevent very low-income persons, especially those earning 30% or less of median income, from becoming homeless. The long-term goal is to provide more affordable housing options so that this group is not forced to spend all their available funds for housing, with little left over for other needs.

As outlined in the Annual Plan, the City has specific strategies that are directly linked to the reduction of poverty. These strategies, which are illustrated throughout this document, are:

- Employment Opportunities
- Self-Sufficiency Assistance
- Support Services
- Affordable Housing

## NON-HOMELESS SPECIAL NEEDS

### Non-homeless Special Needs

1. *Identify actions taken to address special needs of persons that are not homeless but require supportive housing, (including persons with HIV/AIDS and their families).*

**Program Year 3 CAPER Non-homeless Special Needs response:**

**1. NON-HOMELESS SPECIAL NEEDS OBJECTIVES**

The table below outlines the non-homeless special needs populations' priority needs and goals identified in the Five-Year Consolidated Plan, and FY 2007 accomplishments.

<b>Population</b>	<b>Priority</b>	<b>Funds Expended</b>	<b>Annual Goals (Planned)</b>	<b>Output (Accomplishments)</b>
Elderly Supportive Services	H	\$338,552	3,286 (All Special Needs)	3,224
Elderly Housing Services	H	\$99,237	See above	481
Disabled Supportive Services	H	\$241,493	See above	494
Disabled Housing Services	H	\$38,866	See above	67
<b>TOTAL</b>		<b>\$718,148</b>		<b>4,266</b>

**Elderly Supportive Services**

- El Pueblo Health Center – Preventative Health Services for Children and Elderly
- Interfaith Community Services – Safe and Healthy Senior Independence Program
- Jewish Family and Children’s Services – Serving our Seniors
- Lutheran Social Ministry of the Southwest – Senior and Disabled Public Housing Activities Program
- Pima Council on Aging – Elderly Independence
- Pima Council on Aging – Elder Support
- Pima Council on Aging – Nutrition Services for the Elderly
- Pima Council on Aging – Homecare Services for the Elderly
- St. Elizabeth of Hungary Clinic – Mobile Podiatry Services
- Tucson Urban League, Inc. – Senior Lunch and Recreation Program

**Elderly Housing Services**

- Administration of Resources and Choices – Reverse Mortgage Program
- Miracle Square, Inc. – Independent Living Support Services
- Pima Council on Aging – Home Repair, Adaptation and Maintenance for the Elderly

**Disabled Supportive Services**

- Arts for All, Inc. – Strengthening Children, Youth and Families
- Beacon Group – Parenting Program
- Blake Foundation – My Summer Camp
- Catholic Community Services/Community Outreach Program for the Deaf – Building Skills for Employment
- Catholic Community Services/Community Outreach Program for the Deaf – Parenting with Care
- Handi-Dogs – Service Dog Training Program
- Tucson Scottish Rite Charitable Foundation, Inc. – Wings on Words Summer Day Camp

**Disabled Housing Services**

- DIRECT Center for Independence – Independent Living Services

## Specific HOPWA Objectives

*\*Please also refer to the HOPWA Table in the Needs.xls workbook.*

1. *Overall Assessment of Relationship of HOPWA Funds to Goals and Objectives*  
*Grantees should demonstrate through the CAPER and related IDIS reports the progress they are making at accomplishing identified goals and objectives with HOPWA funding. Grantees should demonstrate:*
  - a. *That progress is being made toward meeting the HOPWA goal for providing affordable housing using HOPWA funds and other resources for persons with HIV/AIDS and their families through a comprehensive community plan;*
  - b. *That community-wide HIV/AIDS housing strategies are meeting HUD's national goal of increasing the availability of decent, safe, and affordable housing for low-income persons living with HIV/AIDS;*
  - c. *That community partnerships between State and local governments and community-based non-profits are creating models and innovative strategies to serve the housing and related supportive service needs of persons living with HIV/AIDS and their families;*
  - d. *That through community-wide strategies Federal, State, local, and other resources are matched with HOPWA funding to create comprehensive housing strategies;*
  - e. *That community strategies produce and support actual units of housing for persons living with HIV/AIDS; and finally,*
  - f. *That community strategies identify and supply related supportive services in conjunction with housing to ensure the needs of persons living with HIV/AIDS and their families are met.*
2. *This should be accomplished by providing an executive summary (1-5 pages) that includes:*
  - a. *Grantee Narrative*
    - i. *Grantee and Community Overview*
      - (1) *A brief description of your organization, the area of service, the name of each project sponsor and a broad overview of the range/type of housing activities and related services*
      - (2) *How grant management oversight of project sponsor activities is conducted and how project sponsors are selected*
      - (3) *A description of the local jurisdiction, its need, and the estimated number of persons living with HIV/AIDS*
      - (4) *A brief description of the planning and public consultations involved in the use of HOPWA funds including reference to any appropriate planning document or advisory body*
      - (5) *What other resources were used in conjunction with HOPWA funded activities, including cash resources and in-kind contributions, such as the value of services or materials provided by volunteers or by other individuals or organizations*
      - (6) *Collaborative efforts with related programs including coordination and planning with clients, advocates, Ryan White CARE Act planning bodies, AIDS Drug Assistance Programs, homeless assistance programs, or other efforts that assist persons living with HIV/AIDS and their families.*
    - ii. *Project Accomplishment Overview*
      - (1) *A brief summary of all housing activities broken down by three types: emergency or short-term rent, mortgage or utility payments to prevent homelessness; rental assistance; facility based housing, including development cost, operating cost for those facilities and community residences*
      - (2) *The number of units of housing which have been created through acquisition, rehabilitation, or new construction since 1993 with any HOPWA funds*

- (3) *A brief description of any unique supportive service or other service delivery models or efforts*
    - (4) *Any other accomplishments recognized in your community due to the use of HOPWA funds, including any projects in developmental stages that are not operational.*
  - iii. *Barriers or Trends Overview*
    - (1) *Describe any barriers encountered, actions in response to barriers, and recommendations for program improvement*
    - (2) *Trends you expect your community to face in meeting the needs of persons with HIV/AIDS, and*
    - (3) *Any other information you feel may be important as you look at providing services to persons with HIV/AIDS in the next 5-10 years*
- b. *Accomplishment Data*
  - i. *Completion of CAPER Performance Chart 1 of Actual Performance in the provision of housing (Table II-1 to be submitted with CAPER).*
  - ii. *Completion of CAPER Performance Chart 2 of Comparison to Planned Housing Actions (Table II-2 to be submitted with CAPER).*



# Housing Opportunities for Persons With AIDS (HOPWA) Program

## Consolidated Annual Performance and Evaluation Report (CAPER) Measuring Performance Outcomes

OMB Number 2506-0133 (Expiration Date: 12/31/2010)

The HOPWA CAPER report for formula grantees provides annual information on program accomplishments in meeting the program's performance outcome measure: maintain housing stability; improve access to care; and reduce the risk of homelessness for low-income persons and their families living with HIV/AIDS. This information is also covered under the Consolidated Plan Management Process (CPMP) report and includes Narrative Responses and Performance Charts required under the Consolidated Planning Regulations. The public reporting burden for the collection of information is estimated to average 45 hours per manual response, or less if an automated data collection and retrieval system is in use, along with 68 hours for record keeping, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Grantees are required to report on the activities undertaken only, thus there may be components of these reporting requirements that may not be applicable. This agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless that collection displays a valid OMB control number.

**Overview.** The Consolidated Annual Performance and Evaluation Report (CAPER) provides annual performance reporting on client outputs and outcomes that enables an assessment of grantee performance in achieving the housing stability outcome measure. The CAPER, in conjunction with the Integrated Disbursement Information System (IDIS), fulfills statutory and regulatory program reporting requirements and provides the grantee and HUD with the necessary information to assess the overall program performance and accomplishments against planned goals and objectives

HOPWA formula grantees are required to submit a CAPER, and complete annual performance information for all activities undertaken during each program year in the IDIS, demonstrating coordination with other Consolidated Plan resources. HUD uses the CAPER and IDIS data to obtain essential information on grant activities, project sponsors, housing sites, units and households, and beneficiaries (which includes racial and ethnic data on program participants). The Consolidated Plan Management Process tool (CPMP) provides an optional tool to integrate the reporting of HOPWA specific activities with other planning and reporting on Consolidated Plan activities.

The revisions contained within this edition are designed to accomplish the following: (1) provide for an assessment of unmet need; (2) streamline reporting sources and uses of leveraged resources; (3) differentiate client outcomes for temporary/short-term and permanent facility-based assistance; (4) clarify indicators for short-term efforts and reducing the risk of homelessness; and (5) clarify indicators for Access to Care and Support for this special needs population. In addition, grantees are requested to comply with the Federal Funding Accountability and Transparency Act 2006 (Public Law 109-282) which requires federal grant recipients to provide general information for all entities (including subrecipients) receiving \$25,000+ in federal funds.

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##### PART 5: Worksheet - Determining Housing Stability Outcomes

##### PART 6: Certification of Continued Use for HOPWA Facility-Based Stewardship Units (Only)

**Continued Use Periods.** Grantees that use HOPWA funds for new construction, acquisition, or substantial rehabilitation are required to operate their facilities for ten years for HOPWA-eligible beneficiaries. For the years in which grantees do not receive and expend HOPWA funding for these activities, the grantee must submit an Annual Certification of Continued Project Operation throughout the required use periods. This certification is included in Part 5 in CAPER.

**Final Assembly of Report.** After the entire report is assembled, please number each page sequentially.

**Filing Requirements.** Within 90 days of the completion of each program year, grantees must submit their completed CAPER to the CPD Director in the grantee's State or Local HUD Field Office, and to the HOPWA Program Office: Office of HIV/AIDS Housing, Room 7212, U.S. Department of Housing and Urban Development, 451 Seventh Street, SW, Washington, D.C. 20410.

**Definitions: Facility-Based Housing Assistance:** All HOPWA housing expenditures which provide support to facilities, including community

residences, SRO dwellings, short-term or transitional facilities, project-based units, master leased units, scattered site units leased by the organization, and other housing facilities approved by HUD.

**Grassroots Organization:** An organization headquartered in the local community where it provides services; has a social services budget of \$300,000 or less annually; and six or fewer full-time equivalent employees. Local affiliates of national or larger organizations are not considered "grassroots."

**Housing Assistance Total:** The non-duplicated number of households receiving housing subsidies and residing in units of facilities that were dedicated to persons living with HIV/AIDS and their families that were supported with HOPWA or leveraged funds during this operating year.

**In-kind Leveraged Resources:** These involve additional types of support provided to assist HOPWA beneficiaries such as volunteer services, materials, use of equipment and building space. The actual value of the support can be the contribution of professional services, based on customary rates for this specialized support, or actual costs contributed from other leveraged resources. In determining a rate for the contribution of volunteer time and services, use the rate established in HUD notices, such as the rate of ten dollars per hour. The value of any donated material, equipment, building, or lease should be based on the fair market value at time of donation. Related documentation can be from recent bills of sales, advertised prices, appraisals, or other information for comparable property similarly situated.

**Leveraged Funds:** The amount of funds expended during the operating year from non-HOPWA federal, state, local, and private sources by grantees or sponsors in dedicating assistance to this client population. Leveraged funds or other assistance used directly in HOPWA program delivery.

**Output:** The number of units of housing or households that receive HOPWA housing assistance during the operating year.

**Outcome:** The HOPWA assisted households who have been enabled to establish or better maintain a stable living environment in housing that is safe, decent, and sanitary, (per the regulations at 24 CFR 574.310(b)) and to reduce the risks of homelessness, and improve access to HIV treatment and other health care and support. The goal that eighty percent of HOPWA clients will maintain housing stability, avoid homelessness, and access care by 2011.

**Permanent Housing Placement:** A supportive housing service that helps establish the household in the housing unit, including reasonable costs for security deposits not to exceed two months of rental costs).

**Program Income:** Gross income directly generated from the use of HOPWA funds, including repayments. See grant administration requirements on program income for state and local governments at 24 CFR 85.25, or for non-profits at 24 CFR 84.24.

**Short-Term Rent, Mortgage and Utility Payments (STRMU):** Subsidy or payments subject to the 21-week limited time period to prevent the homelessness of a household (e.g., HOPWA short-term rent, mortgage and utility payments).

**Stewardship Units:** Units developed, where HOPWA funds were used for acquisition, new construction and rehabilitation, but no longer receive operating subsidies. Report information for the units subject to the three-year use agreement if rehabilitation is non-substantial, and those subject to the ten-year use agreement if rehabilitation is substantial.

**Tenant-Based Rental Assistance (TBRA):** An on-going rental housing subsidy for units leased by the client, where the amount is determined based in part on household income and rent costs. Project-based costs are considered facility-based expenditures.

**Total by Type of Housing Assistance/Services:** The non-duplicated households assisted in units by type of housing assistance dedicated to persons living with HIV/AIDS and their families or services provided that were supported with HOPWA and leveraged funds during the operating year

# Housing Opportunities for Persons with AIDS (HOPWA) Consolidated Annual Performance and Evaluation Report - Measuring Performance Outcomes

OMB Number 2506-0133 (Expiration Date: 12/31/2010)

## Part 1: Grantee Executive Summary

As applicable, complete the charts below followed by the submission of a written narrative to questions A through C, and the completion of Chart D. Chart 1 requests general grantee information and Chart 2 is to be completed for each organization selected or designated as a project sponsor, as defined by CFR 574.3. In Chart 3, indicate each subrecipient organization with a contract/agreement of \$25,000 or greater that assists grantees or project sponsors carrying out their activities. Agreements include: grants, subgrants, loans, awards, cooperative agreements, and other forms of financial assistance; and contracts, subcontracts, purchase orders, task orders, and delivery orders. These elements address requirements in the Federal Funding and Accountability and Transparency Act of 2006 (Public Law 109-282).

### 1. Grantee Information

HUD Grant Number AZ-H06-F002 and AZ-H07-F002		Operating Year for this report 07/01/07 to 06/30/08		
Grantee Name City of Tucson, Community Services Department				
Business Address		310 N Commerce Park Loop		
City, County, State, Zip		Tucson	Pima	AZ 85745
Employer Identification Number (EIN) or Tax Identification Number (TIN)		86-6000266		DUN & Bradstreet Number (DUNs) if applicable 148759165
Congressional District of Business Address		Congressional District 7		
*Congressional District(s) of Primary Service Area(s)		Congressional District 7 and 8		
*Zip Code(s) of Primary Service Area(s)		N/A		
*City(ies) and County(ies) of Primary Service Area(s)		N/A		N/A
Organization's Website Address www.tucsonaz.gov/csd		Does your organization maintain a waiting list? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Have you prepared any evaluation reports? <i>If so, please indicate the location on an Internet site (url) or attach copy.</i>		If yes, explain in the narrative section how this list is administered.		
No				

Service delivery area information only needed for program activities being directly carried out by the grantee

## 2. Project Sponsor Information

In Chart 2, provide the following information for each organization designated or selected to serve as a project sponsor, as defined by CFR 574.3.

Project Sponsor Agency Name Southern Arizona AIDS Foundation		Parent Company Name, if applicable			
Name and Title of Contact at Project Sponsor Agency		Beth Carey, Director of Client Services			
Email Address		<a href="mailto:bcarey@saaf.org">bcarey@saaf.org</a>			
Business Address		375 S. Euclid Ave.			
City, County, State, Zip,		Tucson	Pima	AZ	85719
Phone Number (with area codes)		520-628-7223		Fax Number (with area code) 520-628-7222	
Employer Identification Number (EIN) or Tax Identification Number (TIN)		86-0864100		DUN & Bradstreet Number (DUNs) if applicable 197335730	
Congressional District of Business Location of Sponsor		Congressional District 7			
Congressional District(s) of Primary Service Area(s)		Congressional Districts 7, 8			
Zip Code(s) of Primary Service Area(s)		SAAF's office is in 85719. Housing is throughout Pima County			
City(ies) and County(ies) of Primary Service Area(s)		Tucson		Pima	
Total HOPWA contract amount for this Organization		\$ 348,367 (07-09 contract) plus \$69,113 (remaining from 06-08 contract)			
Organization's Website Address <a href="http://www.saaf.org">www.saaf.org</a>		Does your organization maintain a waiting list? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
Is the sponsor a nonprofit organization? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		If yes, explain in the narrative section how this list is administered.			
Please check if yes and a faith-based organization. <input type="checkbox"/>					
Please check if yes and a grassroots organization. <input type="checkbox"/>					

### 3. Subrecipient Information - N/A

In Chart 3, provide the following information for each subrecipient with a contract/agreement of \$25,000 or greater that assist the grantee or project sponsors to carry out their administrative or service delivery functions. Agreements include: grants, subgrants, loans, awards, cooperative agreements, and other forms of financial assistance; and contracts, subcontracts, purchase orders, task orders, and delivery orders. (Organizations listed may have contracts with project sponsors or other organizations beside the grantee.) These elements address requirements in the Federal Funding and Accountability and Transparency Act of 2006 (Public Law 109-282).

Subrecipient Name		Parent Company (if applicable)		
COPE Community Services, Inc.				
Name and Title of Contact at Subrecipient	Mary Specio-Boyer, Director of Community Health			
Email Address	Mspecio-boyer@copebhs.com			
Business Address	82 South Stone Avenue			
City, State, Zip, County	Tucson	AZ	85701	Pima
Phone Number (with area code)	520-792-3293		Fax Number (with area code)	
			520-792-4336	
Employer Identification Number (EIN) or Tax Identification Number (TIN)	86-0363717		DUN & Bradstreet Number (DUNs) if applicable	
			625140330	
North American Industry Classification System (NAICS) Code	62112, 621330, 621399			
Congressional District of Location	Congressional District 7			
Congressional District of Primary Service Area	Congressional Districts 7, 8			
Zip Code of Primary Service Area(s)	85705 85716 85719			
City(ies) and County(ies) of Primary Service Area(s)	Tucson		Pima	
Total HOPWA Contract Amount	\$41,430			

### A. Grantee and Community Overview

Provide a one to three page narrative summarizing major achievements and highlights that were proposed and completed during the program year. Include a brief description of the grant organization, area of service, the name(s) of the program contact(s), and an overview of the range/type of housing activities provided. This overview may be used for public information, including posting on HUD's website. *Note: Text fields are expandable.*

Tucson became a HOPWA formula area in 2002. The City of Tucson Community Services is the grantee and contracts with the Southern Arizona AIDS Foundation (SAAF) as project sponsor. The range/type of housing activities for 2007-2008 are emergency short-term rent, mortgage and utility assistance, rental assistance for tenant-based permanent housing units, case management and supportive services including permanent housing placement, optical and transportation assistance to low income people living with HIV/AIDS and their families. Clinical case management is provided through a sub-contract with COPE Community Services, Inc.

The area of service is Pima County, AZ including the City of Tucson, AZ. Pima County is Arizona's second most populated urban county and has a prevalence rate of reported HIV Disease of 232 per 100,000. With 15.3% of the state's population, Pima County has 17.3% of known HIV/AIDS prevalence, according to the Arizona Department of Health Services 2008 annual report.

SAAF is a community-based organization in Southern Arizona providing comprehensive case management and support services for people living with HIV/AIDS. People living with HIV/AIDS are referred to the housing program through SAAF case management. SAAF's housing program maintains a waiting list and eligibility is determined through a fair and consistent application process and prospective residents are placed on the list in chronological order based respectively on the date of their submission of completed application. The waiting list is reviewed weekly by SAAF housing and case management staff and all application documentation is maintained in a centralized database or housing log book as applicable.

SAAF's housing program includes 83 housing units owned by SAAF that are available to people living with HIV/AIDS, and through a collaboration with the City of Tucson, subsidies for tenant-based rental assistance for an additional 60 households. The housing program provides stable, well-maintained, affordable rental homes for people with HIV/AIDS who would otherwise be living in homeless or near-homeless conditions. Over 220 people benefit from the SAAF housing program at any given time. In addition to the HOPWA Formula funds, housing assistance is provided through a combination of funding sources including a HOPWA Competitive grant, Continuum of Care Supportive Housing Program, Shelter Plus Care and PRAC 811.

The housing services provided by the HOPWA formula contract are leveraged through funds from the Ryan White Part B Program, Pima County Outside Agency, private foundations, and corporate and donor fundraising. These support services include medication assistance, food programs, dental services and attendant care. The combination of services provided has been effective in increasing housing stability, addressing barriers to care, improving access to care, and promoting housing readiness.

The City of Tucson and SAAF are both active members of the Tucson Planning Council for the Homeless, the local Continuum of Care, and SAAF is also active in the Pima County HIV/AIDS Consortium, the local Ryan White consortium.

Program contact is Beth Carey, Director of Client Services, at 375 S. Euclid Avenue, Tucson, AZ 85719. Phone contact is (520) 628-7223 and fax is (520) 628-7222. E-mail contact is [bcarey@saaf.org](mailto:bcarey@saaf.org).

### B. Annual Performance under the Action Plan

Provide a narrative addressing each of the following four items:

**1. Outputs Reported.** Describe significant accomplishments or challenges in achieving the number of housing units supported and the number households assisted with HOPWA funds during this operating year compared to plans for this assistance, as approved in the Consolidated Plan/Action Plan. Describe how HOPWA funds were distributed during your program year among different categories of housing and geographic areas to address needs throughout the grant service area, consistent with approved plans.

**2. Outcomes Assessed.** Assess program goals against actual client outcomes for achieving housing stability, reducing risks of homelessness, and improving access to care. If current year results are lower than the national program targets (80 percent of

HOPWA clients maintain housing stability, avoid homelessness and access care), please describe the steps being taken to achieve the national outcome goal in next operating year.

**3. Coordination.** Report on program coordination with other mainstream housing and supportive services resources, including the use of committed leveraging from other public and private sources that helped to address needs for eligible persons identified in the Consolidated Plan/Strategic Plan.

**4. Technical Assistance.** Describe any program technical assistance needs and how they would benefit program beneficiaries.

**HOPWA Objectives -- Annual Performance under the Action Plan**

*1. Actions taken that address needs of persons who are not homeless but require supportive housing and assistance for persons who are homeless.*

Persons who were not homeless received emergency short-term rent, mortgage and utility assistance, rental assistance for tenant-based permanent housing units, case management and clinical case management, and supportive services including permanent housing placement and transportation assistance.

Persons who were homeless received rental assistance for tenant-based permanent housing units, case management and clinical case management, and supportive services including permanent housing placement and transportation assistance.

*2. Progress in meeting objectives for providing affordable housing, including a comparison of actual outputs and outcomes to proposed goals and progress made on the other planned actions.*

During the period from July 1, 2007 through June 30, 2008, SAAF provided the following services to people living with HIV/AIDS through this contract.

- 1,002 people living with HIV/AIDS received case management services from a pool of all case management sources (proposed number was 850 people)
- 480 people living with HIV/AIDS benefited from non-case management HOPWA funded supportive services (proposed number was 400 people)
- 130 households received assistance with short-term rent/mortgage/utility assistance in order to maintain housing stability (proposed number was 100 households)
- 98 people living with HIV/AIDS benefited from the specialized services of the clinical case manager (proposed total was 65 people)
- 7 households benefited from community based permanent supportive housing units (proposed number was 6)

*3. HOPWA output goals and assessment of client outcomes for achieving housing stability, reduced risks of homelessness and improved access to care.*

**Outcome 1. Increase housing stability**

- *Prevent homelessness for people living with HIV/AIDS and their families through the provision of short-term rent, mortgage, and utility assistance. (STRMU)*

SAAF provided emergency short-term rent, mortgage, and utility assistance to 130 households. Data from the most recent assessment indicates that 93% maintained stable housing in private housing, were placed in other housing subsidy programs, or have reduced their risk of homelessness. For a number of clients, STRMU is used as a shallow-subsidy program, where the client is able to maintain their own private housing with periodic STRMU assistance. All clients have a housing plan and case managers work with clients to determine whether there is a need for a more affordable housing unit or a deeper housing subsidy program.

It is expected that 35% of clients who accessed STRMU this year will need assistance for one or two months in the coming year due to living on very low incomes and other issues arising from their HIV/AIDS condition. We have seen a marked increase in the number of people needing STRMU assistance this year due to difficult economic times. This includes a number of people who are facing loss of homes due to the mortgage crisis. Mortgage assistance more than doubled in this contract year.

- *Provide rental assistance for permanent supportive housing for people living with HIV/AIDS at community locations.*

Seven (7) households received tenant-based rental assistance through this contract. 100% remained in the program throughout the contract year.

**Outcome 2. People living with HIV/AIDS address barriers to care by accessing community-based, government-based, and healthcare services and benefits.**

- *Provide case management and access to support services through provision of service or referral to services as needed.*

All SAAF clients meet with the case management team to receive assessment, care/empowerment plan development, referral and support. During this past year 1002 people living with HIV/AIDS received case management services from a pool of all case management sources. Access to housing and access to healthcare services and benefits is a priority at intake and each assessment.

Based on ongoing chart review sampling, 93% of clients are accessing medical care on a regular basis. 97% have access to medical coverage, including coverage from Ryan White Part B program providers.

100% of the households receiving housing-related assistance through this contract received support services in addition to case management. HOPWA-funded support services, not including case management, was provided to 480 clients. 327 clients received transportation assistance and 208 received optical assistance.

Permanent housing placement services (not exceeding the equivalent of two months of rent costs) was provided to 48 households.

**Outcome 3. People living with HIV/AIDS and dealing with substance abuse and/or mental health issues obtain and maintain housing.**

- *Provide clinical case management services to promote housing readiness and increase housing stability.*

The clinical case manager worked with 98 clients throughout the year to obtain and maintain housing.

*4. Use of committed leveraging from other public and private sources that helped to address needs identified in the plan.*

Leveraged sources included in this report are funding through Ryan White Part B Program, local County sources (Pima County Outside Agency), SAAF community fundraising and private foundations.

*5. Accomplishments recognized in the community due to HOPWA funds.*

Both SAAF and the City of Tucson are members of the local Continuum of Care through the Tucson Planning Council for the Homeless. HOPWA-funded housing services are reported in the annual Continuum of Care application. SAAF and the City of Tucson also participate in the local HMIS Committee coordinated through the Tucson Planning Council for the Homeless.

*6. Analysis of the extent to which HOPWA funds were distributed among different categories of housing needs consistent with the geographic distribution plans identified in the approved Consolidated Plan.*

Services are provided to low-income people living with HIV/AIDS and their families who reside in the City of Tucson and Pima County. HOPWA funds were distributed among the categories of short-term rent, mortgage, and utility assistance, tenant based rental assistance at scattered sites, supportive services, project sponsor administration and grantee administration.

**1-C. Program Year 1 CAPER Specific HOPWA Objectives -- Barriers or Trends Overview:**

**C. Barriers and Trends Overview**

Provide a narrative addressing items 1 through 3. Explain how barriers and trends affected your program's ability to achieve the objectives and outcomes discussed in the previous section.

1. Describe any barriers (including regulatory and non-regulatory) encountered, actions taken in response to barriers, and recommendations for program improvement. Provide an explanation for each barrier selected.

- |   |  |   |   |
|---|--|---|---|
| <input type="checkbox"/> HOPWA/HUD Regulations          | <input type="checkbox"/> Planning                      | <input type="checkbox"/> Housing Availability | <input type="checkbox"/> Rent Determination and Fair Market Rents |
| <input type="checkbox"/> Discrimination/Confidentiality | <input checked="" type="checkbox"/> Multiple Diagnoses | <input type="checkbox"/> Eligibility          | <input type="checkbox"/> Technical Assistance or Training         |
| <input checked="" type="checkbox"/> Supportive Services | <input type="checkbox"/> Credit History                | <input type="checkbox"/> Rental History       | <input type="checkbox"/> Criminal Justice History                 |
| <input type="checkbox"/> Housing Affordability          | <input type="checkbox"/> Other, please explain further |   |   |

2. Describe any trends in the community that may affect the way in which the needs of persons living with HIV/AIDS are being addressed, and provide any other information important to the future provision of services to this population.

3. Identify any evaluations, studies, or other assessments of the HOPWA program that are available to the public.

*1. Barriers encountered, actions in response to barriers, and recommendations for program improvement.*

Community resources for substance abuse treatment and mental health services remain limited, yet clients new to SAAF continue to present with high levels of need. The funds provided through this grant for the Clinical Case Manager, and limited substance abuse in-patient treatment funds through the HOPWA competitive grant, have been crucial for clients in dealing with barriers faced due to mental illness and/or substance abuse.

Funding levels for major federal programs serving people living with HIV/AIDS is decreasing, creating a strain on the care system. SAAF has made changes in eligibility for some support services in order to prioritize resources in the areas of housing basic needs assistance.

*2. Expected trends facing the community in meeting the needs of persons living with HIV/AIDS, and provide other information important in providing services to persons with HIV/AIDS.*

Clients new to SAAF frequently are faced with mental health and substance abuse issues. In addition, the clients served through SAAF are predominantly low income, with 94% of clients living within 80% of area median income, and 58% living at or below 30% of area median income.

While SAAF has been able to increase capacity for permanent supportive housing in the past year, SAAF maintains a waiting list of clients in need of housing. In the past year, SAAF has seen an increase in clients needing assistance with short-term, rent, mortgage and utility assistance. Mortgage assistance more than doubled during this contract year. We expect this trend to continue in the coming year, especially in light of difficult economic times.

*3. Evaluation, studies or other assessments of the HOPWA Program available to the public.*

SAAF has an evaluation plan in place for its housing services including HOPWA programs. This evaluation plan was reported in the HOPWA Annual Performance Report through the contract with Pima County. The following are some of the results of the evaluation using data from January 1, 2007 through December 31, 2007.

- Of the clients served in all of SAAF housing in 2007, 95% of the clients in tenant based units have remained in housing for more than 6 months. 90% of clients in SAAF properties have remained in housing for more than 6 months.
- Comparing 2006 and 2007, a higher percentage of clients from the waiting list moved into housing in 2007 and the average length of time on the waiting list decreased from 2006 to 2007. The average length of time on the waiting list in 2007 was 48 days.

Clients in SAAF properties and tenant-based units continue to show satisfaction with their housing. Results of the annual housing survey showed an increase in satisfaction in both types of housing compared to the 2006 survey. As in 2006, the 2007 survey indicated that those in SAAF properties are more satisfied with their apartment and responsiveness of property management compared to those in tenant-based units. However, households in tenant-based units show longer stability in their units than in SAAF properties. Some of this is due to some of the SAAF units being transitional units and clients in these units who are more vulnerable.

Within the program year, SAAF's housing program continued to make improvements.

- Improvements were made to three SAAF properties in 2007 and included an energy audit resulting in upgraded energy efficient appliances, dual pane windows and water conserving faucets and toilets. Another property had old pipes and water heaters replaced as well as exterior improvements.
- Ongoing life skills training for housing residents were held to increase stability at the housing facilities.

- One of the case managers was given additional responsibilities for housing application oversight to improve consistency in the housing application process. Three case manager positions were designated as Housing Case Managers to provide clients who are part of SAAF's Housing Program with comprehensive case management in coordination with each medical provider, supporting housing program participants and their households to obtain and maintain housing and ensure access and adherence to medical care and supportive services.

**D. Unmet Housing Needs: An Assessment of Unmet Housing Needs**

In Chart 1, provide an assessment of the number of HOPWA-eligible households that require housing assistance but are not currently served by HOPWA in this service area.

In Line 1, report the total unmet need of the geographical service area, as reported in *Unmet Needs for Persons with HIV/AIDS*, Table 1B of the Consolidated or Annual Plan(s), or as reported under HOPWA worksheet in the Needs Workbook of the Consolidated Planning Management Process (CPMP) tool. *Note: Report most current data available, through Consolidated or Annual Plan(s), and account for local housing issues, or changes in HIV/AIDS cases, by using combination of one or more of the sources in Chart 2.*

In Rows a through c, enter the number of HOPWA-eligible households by type of housing assistance whose housing needs are not met. For an approximate breakdown of overall unmet need by type of housing assistance refer to the Consolidated or Annual Plan (s), CPMP tool or local distribution of funds.

**1. Assessment of Unmet Need for HOPWA-eligible Households**

1. Total number of households that have unmet housing needs	= 285
<b>From Item 1, identify the number of households with unmet housing needs by type of housing assistance</b>	
a. Tenant-Based Rental Assistance (TBRA)	= 150
b. Short-Term Rent, Mortgage and Utility payments (STRMU)	= 120
c. Housing Facilities, such as community residences, SRO dwellings, other housing facilities	= 15

**2. Recommended Data Sources for Assessing Unmet Need (check all sources used)**

<input checked="" type="checkbox"/> = Data as reported in the area Consolidated Plan, e.g. Table 1B, CPMP charts, and related narratives
<input type="checkbox"/> = Data established by area HIV/AIDS housing planning and coordination efforts, e.g. Continuum of Care
<input type="checkbox"/> = Data from client information provided in Homeless Management Information Systems (HMIS)
<input checked="" type="checkbox"/> = Data from project sponsors or housing providers, including waiting lists for assistance or other assessments on need
<input type="checkbox"/> = Data from prisons or jails on persons being discharged with HIV/AIDS, if mandatory testing is conducted
<input checked="" type="checkbox"/> = Data from local Ryan White Planning Councils or reported in CARE Act Data Reports, e.g. number of clients with permanent housing
<input checked="" type="checkbox"/> = Data collected for HIV/AIDS surveillance reporting or other health assessments, e.g. local health department or CDC surveillance data

From Arizona Department of Health Services Office of HIV/AIDS – Annual Report 2008

Total persons living with HIV/AIDS in Pima County – 2,203 (likely underreported by 10% according to ADHS Epidemiologist)

Total persons with Unmet Need for HIV Primary Care in Pima County is 1,040

From the Pima County Ryan White Consortium Comprehensive Needs Assessment Report September 2007

86% of those surveyed said they were permanently housed (14% needing housing)

Consumers ranked housing assistance as the number 6 priority after medical care, medications, oral health, mental health and case management.

Southern Arizona AIDS Foundation Client Demographics

SAAF served 1028 people living with HIV/AIDS in 2007/2008

160 clients are homeless or live in non-permanent housing

It is estimated that 125 new clients will access services for the first time in 2008/2009

It is estimated that 45 households who accessed STRMU this past year, will continue to need assistance in 2008/2009

It is estimated that 90 new households will apply for housing this coming year

**End of PART 1**

**PART 2: Sources of Leveraging**

Report the source(s) of cash or in-kind leveraged federal, state, local or private resources identified in the Consolidated or Annual Plan and used in the delivery of the HOPWA program and the amount of leveraged dollars.

[1] Sources of Leveraging		Total Amount of Leveraged Dollars (for this operating year)	
		[2] Housing Assistance	[3] Supportive Services and other non-direct housing costs
1.	Program Income	=	=
2.	Federal government (please specify):	=	=
	Ryan White Part B (Medications Assistance, Mental Health Services, Attendant Care, Oral Health Services)	=	= 79,194
		=	=
		=	=
3.	State government (please specify)	=	=
		=	=
		=	=
4.	Local government (please specify)	=	=
	Pima County Outside Agency	=	= 14,678
	Tohono O'Odham Nation	=	= 8,000
		=	=
5.	Foundations and other private cash resources (please specify)	=	=
	Armstrong McDonald, Nordstrom, Lovell Foundation	=	= 6,465
	Broadway Cares, Stocker Foundation, Sundt Foundation, Elizabeth Read Taylor Foundation, Southern Arizona Foundation	=	= 8,444
		=	=
6.	In-kind Resources	=	= 1,137,026
	Tucson Community Food Bank, Arizona Health Care Cost Containment System (AHCCCS)		
7.	Resident rent payments in Rental, Facilities, and Leased Units	= 15,249	=
8.	Grantee/project sponsor (Agency) cash	=	=
9.	<b>TOTAL (Sum of 1-7)</b>	= 15,249	= \$ 1,253,807

End of PART 2

### PART 3: Accomplishment Data - Planned Goal and Actual Outputs

In Chart 1, enter performance information (goals and actual outputs) for all activities undertaken during the operating year supported with HOPWA funds. Performance is measured by the number of households and units of housing that were supported with HOPWA or other federal, state, local, or private funds for the purposes of providing housing assistance and support to persons living with HIV/AIDS and their families. *Note: The total households assisted with HOPWA funds and reported in PART 3 of the CAPER should be the same as reported in the annual year-end IDIS data, and goals reported should be consistent with the Annual Plan information. Any discrepancies or deviations should be explained in the narrative section of PART 1.*

#### 1. HOPWA Performance Planned Goal and Actual Outputs

HOPWA Performance Planned Goal and Actual		Output Households				Funding	
		HOPWA Assistance		Non-HOPWA		e.	f.
		a.	b.	c.	d.		
		Goal	Actual	Goal	Actual	HOPWA Budget	HOPWA Actual
<b>Housing Subsidy Assistance</b>		<b>Output Households</b>					
1.	Tenant-Based Rental Assistance	6	7			29,933	21,405
2a.	Households in permanent housing facilities that receive operating subsidies/leased units						
2b.	Households in transitional/short-term housing facilities that receive operating subsidies/leased units						
3a.	Households in permanent housing facilities developed with capital funds and placed in service during the program year						
3b.	Households in transitional/short-term housing facilities developed with capital funds and placed in service during the program year						
4.	Short-Term Rent, Mortgage and Utility Assistance	100	130			100,163	97,708
5.	Adjustments for duplication (subtract)						
6.	<b>Total Housing Subsidy Assistance</b>	106	137			130,096	119,113
<b>Housing Development (Construction and Stewardship of facility based housing)</b>		<b>Output Units</b>					
7.	Facility-based units being developed with capital funding but not opened (show units of housing planned)						
8.	Stewardship Units subject to 3 or 10 year use agreements						
9.	<b>Total Housing Developed</b>						
<b>Supportive Services</b>		<b>Output Households</b>					
10a.	Supportive Services provided by project sponsors also delivering HOPWA housing assistance						
10b.	Supportive Services provided by project sponsors serving households who have other housing arrangements	400	524			257,534	208,769
11.	Adjustment for duplication (subtract)						
12.	<b>Total Supportive Services</b>	400	524			257,534	208,769
<b>Housing Placement Assistance Activities</b>							
13.	Housing Information Services						
14.	Permanent Housing Placement Services	45	48			32,581	31,632
15.	Adjustment for duplication						
16.	<b>Total Housing Placement Assistance</b>	45	48			32,581	31,632
<b>Grant Administration and Other Activities</b>							
17.	Resource Identification to establish, coordinate and develop housing assistance resources						
18.	Technical Assistance (if approved in grant agreement)						
19.	Grantee Administration (maximum 3% of total HOPWA grant)					11,700	11,201
20.	Project Sponsor Administration (maximum 7% of portion of HOPWA grant awarded)						
<b>Total Expenditures for program year (Sum of rows 6, 9, 12, 16, and 20)</b>						27,202	22,975
						459,113	393,690

**2. Listing of Supportive Services**

Report on the use of HOPWA funds for all supportive services. In Rows 1 through 16, provide the (unduplicated) total of all households and expenditures for each type of supportive service for all project sponsors.

Supportive Services		Number of Households Receiving HOPWA Assistance	Amount of HOPWA Funds Expended
1.	Adult day care and personal assistance		
2.	Alcohol and drug abuse services	97	4,295
3.	Case management/client advocacy/ access to benefits & services	369	142,918
4.	Child care and other child services		
5.	Education		
6.	Employment assistance and training		
7.	Health/medical/intensive care services, if approved Note: Client records must conform with 24 CFR §574.310		
8.	Legal services		
9.	Life skills management (outside of case management)		
10.	Meals/nutritional services		
11.	Mental health services		
12.	Outreach		
13.	Transportation	327	34,323
14.	Other Activity (if approved in grant agreement). Specify: Optical services	208	27,233
15.	Adjustment for Duplication (subtract)		
16.	<b>TOTAL Households receiving Supportive Services (unduplicated)</b>	524	208,769

End of PART 3

**Part 4: Summary of Performance Outcomes**

HOPWA Long-term Performance Objective: *Eighty percent of HOPWA clients will maintain housing stability, avoid homelessness, and access care each year through 2011.*

**Section 1. Housing Stability: Assessment of Client Outcomes on Maintaining Housing Stability (Permanent Housing and Related Facilities)**

In Column 1, report the total number of eligible households that received HOPWA housing assistance, by type. In Column 2, enter the number of households continuing to access each type of housing assistance, the following year. In Column 3, report the housing status of all households that exited the program. Columns 2 (Number of Households Continuing) and 3 (Exited Households) summed will equal the total households reported in Column 1. *Note: Refer to the housing stability codes that appear in Part 5: Worksheet - Determining Housing Stability Outcomes.*

[A] Permanent Housing Assistance	[1] Total Number of Households Receiving Housing Assistance	[2] Assessment: Number of Households Continuing with this Housing (per plan or expectation for next year)		[3] Assessment: Number of Exited Households and Housing Status	
Tenant-Based Rental Assistance	= 7	= 7		1 Emergency Shelter/Streets	=
				2 Temporary Housing	=
				3 Private Housing	=
				4 Other HOPWA	=
				5 Other Subsidy	=
				6 Institution	=
				7 Jail/Prison	=
				8 Disconnected/Unknown	=
				9 Death	=
Permanent Supportive Housing Facilities/Units	=	=		1 Emergency Shelter/Streets	=
				2 Temporary Housing	=
				3 Private Housing	=
				4 Other HOPWA	=
				5 Other Subsidy	=
				6 Institution	=
				7 Jail/Prison	=
				8 Disconnected/Unknown	=
				9 Death	=
[B] Transitional Housing Assistance	[1] Total Number of Households Receiving Housing Assistance	[2] Of the Total Number of Households Receiving Housing Assistance this Operating Year		[3] Assessment: Number of Exited Households and Housing Status	
Transitional/Short-Term Supportive Facilities/Units	=	Total number of households that will continue in residences:	=	1 Emergency Shelter/Streets	=
		2 Temporary Housing	=		
		3 Private Housing	=		
		4 Other HOPWA	=		
		Total number of households whose tenure exceeded 24 months:	=	5 Other Subsidy	=
		6 Institution	=		
		7 Jail/Prison	=		
		8 Disconnected/unknown	=		
		9 Death	=		

**Section 2. Prevention of Homelessness: Assessment of Client Outcomes on Reduced Risks of Homelessness (Short-Term Housing Assistance)**

Report the total number of households that received STRMU assistance in Column 1. In Column 2, identify the result of the housing assessment made at time of assistance, or updated in the operating year. (Column 3 provides a description of housing outcomes; therefore, data is not required.) In Row 1a, enter the total number of households served in the prior operating year that received STRMU assistance this year. In Row 1b, enter the total number of households that received STRMU Assistance in the 2 prior operating years that received STRMU assistance this year. *Note: The sum of Column 2 should equal the number of households reported in Column 1.*

**Assessment of Households receiving STRMU Assistance**

[1] STRMU Housing Assistance	[2] Assessment of Housing Status		[3] HOPWA Client Outcomes
= 130	Maintain Private Housing without subsidy (e.g. Assistance provided/completed and client is stable, not likely to seek additional support)	= 45	<i>Stable/Permanent Housing (PH)</i>
	Other Private Housing without subsidy	= 6	
	Other HOPWA support (PH)	= 13	
	Other housing subsidy (PH)	= 8	
	Institution (e.g. residential and long-term care)	=	
	Likely to maintain current housing arrangements, with additional STRMU assistance	= 46	<i>Temporarily Stable, with Reduced Risk of Homelessness</i>
	Transitional Facilities/Short-term (e.g. temporary or transitional arrangement)	= 1	<i>Unstable Arrangements</i>
	Temporary/non-permanent Housing arrangement (e.g. gave up lease, and moved in with family or friends but expects to live there less than 90 days)	= 5	
	Emergency Shelter/street	=	
	Jail/Prison	= 1	
Disconnected	= 2	<i>Life Event</i>	
Death	= 3		
1a. Total number of households that received STRMU assistance in the prior operating year, that also received STRMU assistance in the current operating year.			= 47
1b. Total number of those households that received STRMU assistance in the two (2 years ago) prior operating years, that also received STRMU assistance in the current operating year.			= 25

### Section 3. HOPWA Outcomes on Access to Care and Support

#### 1A. Status of Households Accessing Care and Support by Project Sponsors delivering HOPWA Housing Assistance/Housing Placement/Case Management

Use Table 1 A for project sponsors that provide HOPWA housing assistance/housing placement with or without case management services. In Table 1A, identify the number of client households receiving any type of HOPWA housing assistance that demonstrated improved access or maintained connections to care and support within the program year by: having a housing plan; having contact with a case manager/benefits counselor; visiting a primary health care provider; accessing medical insurance/assistance; and accessing or qualifying for income benefits. *Note: For information on types and sources of income and medical insurance/assistance, refer to Charts 1C and 1D.*

Categories of Services Accessed	Households Receiving Housing Assistance within the Operating Year	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing.	500	Support for Stable Housing
2. Has contact with case manager/benefits counselor consistent with the schedule specified in client's individual service plan.	524	Access to Support
3. Had contact with a primary health care provider consistent with the schedule specified in client's individual service plan,	487	Access to Health Care
4. Has accessed and can maintain medical insurance/assistance.	508	Access to Health Care
5. Successfully accessed or maintained qualification for sources of income.	432	Sources of Income

#### 1B. Number of Households Obtaining Employment

In Table 1B, identify the number of recipient households that include persons who obtained an income-producing job during the operating year that resulted from HOPWA funded: job training, employment assistance, education or related case management/counseling services. *Note: This includes jobs created by this project sponsor or obtained outside this agency.*

Categories of Services Accessed	Number of Households that Obtained Employment	Outcome Indicator
Total number of households that obtained an income-producing job	n/a	Sources of Income

#### Chart 1C: Sources of income include, but are not limited to the following (Reference only)

• Earned Income	• Veteran's Pension
• Unemployment Insurance	• Pension from Former Job
• Supplemental Security Income (SSI)	• Child Support
• Social Security Disability Income (SSDI)	• Alimony or Other Spousal Support
• Veteran's Disability Payment	• Retirement Income from Social Security
• General Assistance, or use local program name	• Private Disability Insurance
• Temporary Assistance for Needy Families (TANF) income, or use local program name	• Worker's Compensation

#### Chart 1D: Sources of medical insurance and assistance include, but are not limited to the following (Reference only)

• MEDICAID Health Insurance Program, or local program name	• MEDICARE Health Insurance Program, or local program name
• Veterans Affairs Medical Services	• AIDS Drug Assistance Program (ADAP)
• State Children's Health Insurance Program (SCHIP), or local program name	• Ryan White-funded Medical or Dental Assistance

**2A. Status of Households Accessing Care and Support through HOPWA-funded Services receiving Housing Assistance from Other Sources**

In Table 2A, identify the number of client households served by project sponsors receiving HOPWA-funded housing placement or case management services who have other and housing arrangements that demonstrated improved access or maintained connections to care and support within the program year by: having a housing plan; having contact with a case manager/benefits counselor; visiting a primary health care provider; accessing medical insurance/assistance; and accessing or qualifying for income benefits. *Note: For information on types and sources of income and medical insurance/assistance, refer to Charts 2C and 2D.*

Categories of Services Accessed	Households Receiving HOPWA Assistance within the Operating Year	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing.		Support for Stable Housing
2. Successfully accessed or maintained qualification for sources of income.		Sources of Income
3. Had contact with a primary health care provider consistent with the schedule specified in clients individual service plan.		Access to Health Care
4. Has accessed and can maintain medical insurance/assistance.		Access to Health Care
5. Has contact with case manager, benefits counselor, or housing counselor consistent with the schedule specified in client's individual service plan.		Access to Support

**2B. Number of Households Obtaining Employment**

In Table 2B, identify the number of recipient households that include persons who obtained an income-producing job during the operating year that resulted from HOPWA funded: job training, employment assistance, education or related case management/counseling services. *Note: This includes jobs created by this project sponsor or obtained outside this agency.*

Categories of Services Accessed	Number of Households that Obtained Employment	Outcome Indicator
Total number of households that obtained an income-producing job		Sources of Income

**Chart 2C: Sources of income include, but are not limited to the following (Reference only)**

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Earned Income</li> <li>• Unemployment Insurance</li> <li>• Supplemental Security Income (SSI)</li> <li>• Social Security Disability Income (SSDI)</li> <li>• Veteran's Disability Payment</li> <li>• General Assistance, or use local program name</li> <li>• Temporary Assistance for Needy Families (TANF) income, or use local program name</li> </ul> | <ul style="list-style-type: none"> <li>• Veteran's Pension</li> <li>• Pension from Former Job</li> <li>• Child Support</li> <li>• Alimony or Other Spousal Support</li> <li>• Retirement Income from Social Security</li> <li>• Private Disability Insurance</li> <li>• Worker's Compensation</li> </ul> |
|--|--|

**Chart 2D: Sources of medical insurance and assistance include, but are not limited to the following (Reference only)**

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• MEDICAID Health Insurance Program, or local program name</li> <li>• Veterans Affairs Medical Services</li> <li>• State Children's Health Insurance Program (SCHIP), or local program name</li> </ul> | <ul style="list-style-type: none"> <li>• MEDICARE Health Insurance Program, or local program name</li> <li>• AIDS Drug Assistance Program (ADAP)</li> <li>• Ryan White-funded Medical or Dental Assistance</li> </ul> |
|---|---|

End of PART 4

## PART 5: Worksheet - Determining Housing Stability Outcomes

I. This chart is designed to assess program results based on the information reported in Part 4.

Permanent Housing Assistance	Stable Housing (# of households remaining in program plus 3+4+5+6=#)	Temporary Housing (2)	Unstable Arrangements (1+7+8=#)	Life Event (9)
Tenant-Based Rental Assistance (TBRA)	7			
Permanent Facility-based Housing Assistance/Units				
Transitional/Short-Term Facility-based Housing Assistance/Units				
<b>Total Permanent HOPWA Housing Assistance</b>	7			
Reduced Risk of Homelessness: Short-Term Assistance	Stable/Permanent Housing	Temporarily Stable, with Reduced Risk of Homelessness	Unstable Arrangements	Life Events
Short-Term Rent, Mortgage, and Utility Assistance (STRMU)	72	52 (46 are projected to remain stable with limited STRMU assistance)	3	3
<b>Total HOPWA Housing Assistance</b>				

### Background on HOPWA Housing Stability Codes

#### Stable Permanent Housing/Ongoing Participation

3 = Private Housing in the private rental or home ownership market (without known subsidy, including permanent placement with families or other self sufficient arrangements) with reasonable expectation that additional support is not needed.

4 = Other HOPWA-funded housing assistance (not STRMU), e.g. TBRA or Facility-Based Assistance.

5 = Other subsidized house or apartment (non-HOPWA sources, e.g., Section 8, HOME, public housing).

6 = Institutional setting with greater support and continued residence expected (e.g., residential or long-term care facility).

#### Temporary Housing

2 = Temporary housing - moved in with family/friends or other short-term arrangement, such as Ryan White subsidy, transitional housing for homeless, or temporary placement in institution (e.g., hospital, psychiatric hospital or other psychiatric facility, substance abuse treatment facility or detox center).

#### Unstable Arrangements

1 = Emergency shelter or no housing destination such as places not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station, or anywhere outside).

7 = Jail /prison.

8 = Disconnected or disappeared from project support, unknown destination or no assessments of housing needs were undertaken.

#### Life Event

9 = Death, i.e., remained in housing until death. This characteristic is not factored into the housing stability equation.

**Tenant-based Rental Assistance:** Stable Housing is the sum of the number of households that (i) remain in the housing and (ii) those that left the assistance as reported under: 3, 4, 5, and 6. Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item: 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

**Permanent Facility-Based Housing Assistance:** Stable Housing is the sum of the number of households that (i) remain in the housing and (ii) those that left the assistance as shown as items: 3, 4, 5, and 6. Temporary Housing is the number of households

that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

**Transitional/Short-Term Facility-Based Housing Assistance:** Stable Housing is the sum of the number of households that (i) continue in the residences (ii) those that left the assistance as shown as items: 3, 4, 5, and 6. Other Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

**Tenure Assessment.** A baseline of households in transitional/short-term facilities for assessment purposes, indicate the number of households whose tenure exceeded 24 months.

**STRMU Assistance:** Stable Housing is the sum of the number of households that accessed assistance for some portion of the permitted 21-week period and there is reasonable expectation that additional support is not needed in order to maintain permanent housing living situation (as this is a time-limited form of housing support) as reported under housing status: Maintain Private Housing with subsidy; Other Private with Subsidy; Other HOPWA support; Other Housing Subsidy; and Institution. Temporarily Stable, with Reduced Risk of Homelessness is the sum of the number of households that accessed assistance for some portion of the permitted 21-week period or left their current housing arrangement for a transitional facility or other temporary/non-permanent housing arrangement and there is reasonable expectation additional support will be needed to maintain housing arrangements in the next year, as reported under housing status: Likely to maintain current housing arrangements, with additional STRMU assistance; Transitional Facilities/Short-term; and Temporary/Non-Permanent Housing arrangements. Unstable Situation is the sum of number of households reported under housing status: Emergency Shelter; Jail/Prison; and Disconnected.

**End of PART 5**

**PART 6: Certification of Continued Usage for HOPWA Facility-Based Stewardship Units (ONLY)**

Grantees that use HOPWA funding for new construction, acquisition, or substantial rehabilitation are required to operate their facilities for HOPWA eligible individuals for at least ten years. If non-substantial rehabilitation funds were used they are required to operate for at least three years. Stewardship begins once the facility is put into operation. This Annual Certification of Continued HOPWA Project Operations is to be used in place of other sections of the APR, in the case that no additional HOPWA funds were expended in this operating year at this facility that had been acquired, rehabilitated or constructed and developed in part with HOPWA funds.

**1. General information**

HUD Grant Number(s)	Operating Year for this report From (mm/dd/yy) To (mm/dd/yy) <input type="checkbox"/> Final Yr  <input type="checkbox"/> Yr 1; <input type="checkbox"/> Yr 2; <input type="checkbox"/> Yr 3; <input type="checkbox"/> Yr 4; <input type="checkbox"/> Yr 5; <input type="checkbox"/> Yr 6;  <input type="checkbox"/> Yr 7; <input type="checkbox"/> Yr 8; <input type="checkbox"/> Yr 9; <input type="checkbox"/> Yr 10;
Grantee Name	Date Facility Began Operations (mm/dd/yy)

**2. Number of Units and Leveraging**

Housing Assistance	Number of Units Receiving Housing Assistance with HOPWA funds	Amount of Leveraging from Other Sources Used during the Operating Year
Stewardship units (developed with HOPWA funds but no current operations or other HOPWA costs) subject to 3 or 10 year use periods		

**3. Details of Project Site**

Name of HOPWA-funded project site	
Project Zip Code(s) and Congressional District(s)	
Is the address of the project site confidential?	<input type="checkbox"/> Yes, protect information; do not list. <input type="checkbox"/> Not confidential; information can be made available to the public.
If the site address is not confidential, please provide the contact name, phone, email, and physical address, if different from business address.	

I certify that the facility that received assistance for acquisition, rehabilitation, or new construction from the Housing Opportunities for Persons with AIDS Program has operated as a facility to assist HOPWA-eligible persons from the date shown above. I also certify that the grant is still serving the planned number of HOPWA-eligible households at this facility through leveraged resources and all other requirements of the grant agreement are being satisfied.

*I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.*

Name & Title of Authorized Official	Signature & Date (mm/dd/yy)
Name & Title of Contact at Grantee Agency <i>(person who can answer questions about the report and program)</i>	Contact Phone (with area code)

End of PART 6

HOPWA – Formula – City of Tucson  
 Southern Arizona AIDS Foundation  
 July 1, 2007 – June 30, 2008

**Tenant-Based Rental Assistance (No duplicates with STRMU)**

**a. Total Number of HOPWA Beneficiaries Served with Housing Assistance**

Individuals and Families Served with Housing Assistance	Total Number
1. Number of eligible individuals with HIV/AIDS who received HOPWA housing assistance (Chart a page 5)	7
2. Number of other persons residing with the above eligible individuals in HOPWA-assisted housing	4
<b>3. TOTAL number of beneficiaries served with Housing Assistance (Rows 1 + 2)</b>	<b>11</b>

**b. Age and Gender**

Category	Male	Female
1. Under 18	3	
2. 18 to 30 years		1
3. 31 to 50 years	5	1
4. 51 years and Older	1	

**c. Race and Ethnicity\***

Category	Total Beneficiaries Served with Housing Assistance	Total Beneficiaries also identified as Hispanic or Latino	Category	Total Beneficiaries Served with Housing Assistance	Total Beneficiaries also identified as Hispanic or Latino
1. American Indian/Alaskan Native			6. American Indian/Alaskan Native & White		
2. Asian			7. Asian & White		
3. Black/African American	1		8. Black/African American and White		
4. Native Hawaiian/Other Pacific Islander			9. American Indian/Alaskan Native & Black/African American		
5. White	10	5	10. Other Multi-Racial		

\*Reference (data requested consistent with Form HUD-27061 Race and Ethnic Data Reporting Form)

**Section 3. Households**

**Household Area Median Income.** Note: Refer to [www.hud.gov](http://www.hud.gov) for information on area median income in your community.

Percentage of Area Median Income	Households Served with Housing Assistance
1. 0-30% of area median income (extremely low)	3
2. 31-50% of area median income (very low)	3
3. 51-60% of area median income (low)	1
4. 61-80% of area median income (low)	

## Short-term Rental, Mortgage, Utility Assistance (STRMU)

### a. Total Number of HOPWA Beneficiaries Served with Housing Assistance

Individuals and Families Served with Housing Assistance	Total Number
1. Number of eligible individuals with HIV/AIDS who received HOPWA housing assistance (Chart a page 5)	130
2. Number of other persons residing with the above eligible individuals in HOPWA-assisted housing	143
3. TOTAL number of beneficiaries served with Housing Assistance (Rows 1 + 2)	273

### b. Age and Gender

Category		Male	Female
1.	Under 18	25	23
2.	18 to 30 years	16	17
3.	31 to 50 years	94	37
4.	51 years and Older	42	19

### c. Race and Ethnicity\*

	Category	Total Beneficiaries Served with Housing Assistance	Total Beneficiaries also identified as Hispanic or Latino		Category	Total Beneficiaries Served with Housing Assistance	Total Beneficiaries also identified as Hispanic or Latino
1.	American Indian/ Alaskan Native	1	1	6.	American Indian/ Alaskan Native & White		
2.	Asian			7.	Asian & White		
3.	Black/African American	50	1	8.	Black/African American and White	1	
4.	Native Hawaiian/Other Pacific Islander	4	0	9.	American Indian/ Alaskan Native & Black/African American	2	1
5.	White	207	86	10.	Other Multi-Racial	8	2

\*Reference (data requested consistent with Form HUD-27061 Race and Ethnic Data Reporting Form)

## Section 3. Households

**Household Area Median Income.** Report the area median income(s) for all households served with HOPWA housing assistance. The total number of households served with housing assistance should equal Part 3C, Row 5. *Note: Refer to [www.hud.gov](http://www.hud.gov) for information on area median income in your community.*

Percentage of Area Median Income		Households Served with Housing Assistance
1.	0-30% of area median income (extremely low)	93
2.	31-50% of area median income (very low)	26
3.	51-60% of area median income (low)	7
4.	61-80% of area median income (low)	4

Explanation of budget numbers on CAPER

SAAF	2007-2009 Budget	2006-2008 remaining Budget	combined Budget
STRMU	\$ 86,000	\$ 14,163	\$ 100,163
Operating			
Supportive Services	\$ 217,577	\$ 39,957	\$ 257,534
(PHP only)	\$ 22,000	\$ 10,581	\$ 32,581
			\$ -
Admin (7%)			\$ -
			\$ -
	\$ 22,790	\$ 4,412	\$ 27,202
<b>Subtotal</b>	<b>\$ 348,367</b>	<b>\$ 69,113</b>	<b>\$ 417,480</b>
City			
TBRA - City	\$ 29,933		\$ 29,933
City Grantee Admin	\$ 11,700		\$ 11,700
	\$ 390,000	\$ 69,113	\$ 459,113

Based on Revised

FINANCIAL SUMMARY

Community Development Block Grant Program  
US Department of Housing and Urban Development  
Office of Community Planning and Development

Name of Grantee: Tucson Consortium, AZ  
Grant Number: B-07-MC-040505  
Reporting Period: 07-01-2007 to 06-30-2008

Part I - Summary of CDBG Resources

1. Unexpended CDBG funds at end of previous period:		<u>\$1,386,184</u>
2. Entitlement grant from HUD-7082 (Grant Agreement):		<u>\$6,331,206</u>
3. Surplus Urban Renewal Funds:		<u>\$0</u>
4. Section 108 Guaranteed Loan funds (principal amount):		<u>\$0</u>
5. Program Income		
Current Year	<u>18,144</u>	
Revolving Funds	<u>117,306</u>	
Other Funds		
Total Program Income:		<u>\$135,450</u>
6. Prior period adjustments (enclose negative amounts in brackets):		<u>\$0</u>
7. Total CDBG funds available during the reporting period:		<u>\$7,852,841</u>

Part II - Summary of CDBG Expenditures

8. Total Program year expenditures:		<u>\$6,379,792</u>
9. Total Expended for planning and administration:		<u>\$1,214,924</u>
10. Amount subject to low/mod benefit calculation:		<u>\$5,164,869</u>
11. CDBG funded Section 108 principle and interest payments:		<u>\$0</u>
12. Total expenditures (line 8 and 11)		<u>\$6,379,792</u>
13. Unexpended balance (line 7 minus line 12):		<u>\$1,473,048</u>

Part III - Low/Mod Credit this Reporting Period

14. Total low/mod credit for multi-unit housing expenditures:		<u>\$0</u>
15. Total from all other activities qualifying as low/mod expenditures:		<u>\$5,014,727</u>
16. Total (line 14 plus line 15):		<u>\$5,014,727</u>
17. Percent benefit to low/mod persons (line 16 divided by line 10):		<u>97%</u>

Part IV - Low/Mod Benefit for Multi Year Certifications

*Complete only if certification period includes prior years. Note: Please refer to Consolidated Plan submission corresponding to the reporting period: Specific CDBG Certifications; Use of Funds (criteria 2.), Overall Benefit - to verify your community's certification period. DO NOT complete this section unless you have certified a multiple year certification period.*

Multiple program years covered in certification (up to three years): \_\_\_\_\_; \_\_\_\_\_; \_\_\_\_\_

18. Cumulative net expenditures subject to program benefit calculation:	_____
19. Cumulative expenditures benefiting low/mod persons:	_____
20. Percent benefit to low mod persons (line 19 divided by line 18):	_____

**Part V - Public Service (PS) Cap Calculation**

21. Total PS expenditures:	\$942,303
22. Total PS unliquidated obligations(carryforward to FY 09):	_____
23. Sum of line 21 and 22:	\$942,303
24. PS unliquidated obligations/contracted in the previous report period:	_____
25. Net obligations for PS (line 23 minus line 24):	\$942,303
26. <u>Amount of program income received in the PRECEDING program yr:</u>	\$158,188
27. Entitlement grant amount (line 2):	\$6,331,206
28. Sum of line 26 and 27:	\$6,489,394
29. Percent funds obligated for PS (line 25 divided by line 28):	15%

**Part VI - Planning and/or Administrative (P&A) Cost Cap Calculation**

30. Total P&A expenditures:	\$1,214,924
31. Total P&A unliquidated obligations:	\$0
32. Sum of line 30 and 31	\$1,214,924
33. P&A unliquidated obligations reported end of previous report period:	_____
34. Net obligations for P&A (line 32 minus line 33):	\$1,214,924
35. <u>Amount of program income received for this program year*:</u>	117,306
36. Entitlement grant amount (line 2):	\$6,331,206
37. Sum of line 35 and 36:	\$6,448,512
38. Percent funds obligated for P&A (line 34 divided by line 37):	19%

\*Total PI received this current year was \$135,450; however, please note that for P&A calculation the recapture PI wasn't counted.