

Grantee: Tucson, AZ

Grant: B-08-MN-04-0507

July 1, 2013 thru September 30, 2013 Performance Report



Grant Number:

B-08-MN-04-0507

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

Tucson, AZ

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

Original - In Progress

LOCCS Authorized Amount:

\$7,286,911.00

Grant Status:

Active

QPR Contact:

Joyce Alcantar

Estimated P/RL Funds:

\$3,225,468.27

Total Budget:

\$10,512,379.27

Disasters:

Declaration Number

NSP

Narratives

Areas of Greatest Need:

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

Distribution and Uses of Funds:

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

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

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

Definitions and Descriptions:**Low Income Targeting:**

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

Acquisition and Relocation:**Public Comment:****Overall****Total Projected Budget from All Sources****This Report Period**

N/A

To Date

\$10,512,379.27

Total Budget

\$728,059.70

\$10,512,379.27

Total Obligated

\$728,059.70

\$10,071,826.97

Total Funds Drawdown

\$10,882.30

\$8,761,236.72

Program Funds Drawdown

\$0.00

\$7,015,392.70



Program Income Drawdown	\$10,882.30	\$1,745,844.02
Program Income Received	\$163,874.47	\$2,875,468.27
Total Funds Expended	\$223,242.38	\$8,981,572.86
Match Contributed	\$0.00	\$0.00

Progress Toward Required Numeric Targets

Requirement	Required	To Date
Overall Benefit Percentage (Projected)		0.00%
Overall Benefit Percentage (Actual)		0.00%
Minimum Non-Federal Match	\$0.00	\$0.00
Limit on Public Services	\$1,093,036.65	\$0.00
Limit on Admin/Planning	\$728,691.10	\$718,138.45
Limit on State Admin	\$0.00	\$718,138.45

Progress Toward Activity Type Targets

Progress Toward National Objective Targets

National Objective	Target	Actual
NSP Only - LH - 25% Set-Aside	\$1,821,727.75	\$2,600,594.82

Overall Progress Narrative:

NSP1 - The following is progress thru September 30, 2013:

>The Cloudburst Group consultation staff continued to assist City of Tucson NSP staff with the items of concern found by HUD CPD Specialist Angela Reviere.

The City of Tucson's NSP1 Action Plan has been revised during this quarter to provide more information on the >"Lease to Purchase" program initially offered to NSP1 beneficiaries while the Pima County Community Land Trust >(PCCLT) was being established. Cloudburst staff assisted with the Action Plan revision, as well as the revision of >the Development Agreement between the City of Tucson and PCCLT. The Action Plan has been revised during this quarter, and will go into effect November 1, 2013.

The City of Tucson purchased two homes this quarter with NSP1 Program Income funds. Addresses are:
9141 E. 39th Street (SFR)
5971 S. Oaklands (SFR)

Five additional homes (including 2 duplexes which will be used as rentals in the EI Portal program) are in escrow, and should close next quarter. Also purchased with NSP1 Program Income.

One home was sold thru the Pima County Community Land Trust (PCCLT). Beneficiary data is included in this report. Address is:
6820 S. 10th Avenue (SFR); NSP1 Program Income; sold thru PCCLT

>

>No additional homes were assigned to the City of Tucson's EI Portal rental program, although 2 NSP1 homes were >rented during the quarter. Beneficiary data is included in this report. Addresses are:
135 S. Westermoreland; occupied by tenant at or below 50% AMI
316 W. 43rd, unit #1; occupied by tenant at or below 50% AMI

City of Tucson staff conducted a monitoring visit at the PCCLT office on June 21st. Items of concern were noted



and a letter was sent to PCCLT for resolution. A second monitoring visit is scheduled for November 5th to review homeowner files and rehabilitation files to verify items were rectified.

Project Summary

Project #, Project Title	This Report Period	To Date	
	Program Funds Drawdown	Project Funds Budgeted	Program Funds Drawdown
0001, Acquisition General	\$0.00	\$9,146,141.34	\$6,532,876.29
0002, NSP Rehabilitation Rental	\$0.00	\$0.00	\$0.00
0004, NSP Rehabilitation Resale	\$0.00	\$0.00	\$0.00
0005, NSP Disposition	\$0.00	\$0.00	\$0.00
0006, NSP Administration	\$0.00	\$926,035.77	\$482,516.41
9999, Restricted Balance	\$0.00	\$0.00	\$0.00



Activities

Grantee Activity Number: 9123

Activity Title: NSP Administration

Activity Category:

Administration

Project Number:

0006

Projected Start Date:

03/23/2009

Benefit Type:

N/A

National Objective:

N/A

Activity Status:

Under Way

Project Title:

NSP Administration

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

City of Tucson1

Overall

Total Projected Budget from All Sources

Jul 1 thru Sep 30, 2013

N/A

To Date

\$1,051,237.93

Total Budget

\$0.00

\$1,051,237.93

Total Obligated

\$0.00

\$925,685.63

Total Funds Drawdown

\$7,682.67

\$718,138.45

Program Funds Drawdown

\$0.00

\$482,516.41

Program Income Drawdown

\$7,682.67

\$235,622.04

Program Income Received

\$0.00

\$74,102.57

Total Funds Expended

\$8,433.39

\$723,571.03

City of Tucson1

\$8,433.39

\$723,571.03

Match Contributed

\$0.00

\$0.00

Activity Description:

Administration of NSP for Tucson, Arizona

Location Description:

Tucson, Arizona.

Activity Progress Narrative:

Admin Expenditures for this quarter \$8,433.39.

Accomplishments Performance Measures

No Accomplishments Performance Measures found.



Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources

Amount

No Other Funding Sources Found

Total Other Funding Sources



Grantee Activity Number: 9535

Activity Title: Acq/Rehab

Activity Category:

Disposition

Project Number:

0001

Projected Start Date:

03/23/2009

Benefit Type:

Direct Benefit (Households)

National Objective:

NSP Only - LH - 25% Set-Aside

Activity Status:

Under Way

Project Title:

Acquisition General

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

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

Overall

	Jul 1 thru Sep 30, 2013	To Date
Total Projected Budget from All Sources	N/A	\$2,600,594.82
Total Budget	(\$15,982.76)	\$2,600,594.82
Total Obligated	(\$15,982.76)	\$2,540,594.82
Total Funds Drawdown	\$0.00	\$2,324,487.70
Program Funds Drawdown	\$0.00	\$2,040,081.53
Program Income Drawdown	\$0.00	\$284,406.17
Program Income Received	\$40,265.96	\$137,912.83
Total Funds Expended	\$855.00	\$2,325,411.19
City of Tucson - El Portal Rental Program, managed by The	\$0.00	\$0.00
City of Tucson1	\$855.00	\$2,325,411.19
Match Contributed	\$0.00	\$0.00

Activity Description:

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

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

Location Description:

Tucson, Arizona

Activity Progress Narrative:

Rental Expenditures for this quarter is \$855.00.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	2	24/17



	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Housing Units	2		21/17	
# of Multifamily Units	0		0/0	
# of Singlefamily Units	2		21/17	

Beneficiaries Performance Measures

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

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	2	0	2	21/17	0/0	21/17	100.00
# Renter Households	2	0	2	21/17	0/0	21/17	100.00

Activity Locations

Address	City	County	State	Zip	Status / Accept
135 S. Westmoreland	Tucson		Arizona	85745-	Match / N
316 W. 43rd Street #1	Tucson		Arizona	85713-	Match / N

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

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



Grantee Activity Number:	9536
Activity Title:	NSP Rehabilitation Rental

Activity Category:

Rehabilitation/reconstruction of residential structures

Activity Status:

Cancelled

Project Number:

0002

Project Title:

NSP Rehabilitation Rental

Projected Start Date:

03/23/2009

Projected End Date:

04/15/2010

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

NSP Only - LH - 25% Set-Aside

Responsible Organization:

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

Overall	Jul 1 thru Sep 30, 2013	To Date
Total Projected Budget from All Sources	N/A	\$0.00
Total Budget	\$0.00	\$0.00
Total Obligated	\$0.00	\$0.00
Total Funds Drawdown	\$0.00	\$0.00
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
City of Tucson - El Portal Rental Program, managed by The	\$0.00	\$0.00
Match Contributed	\$0.00	\$0.00

Activity Description:

Rehabilitate 10 dwelling units purchased from NSP funds to be used as rental units for households that earn under 50% AMI. UPDATE: rehab zeroed out and moved to Acquisition activity.

Location Description:

Tucson, Arizona

Activity Progress Narrative:

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	0	1/0

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	1/0
# of Singlefamily Units	0	1/0



Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	6/0	0/0	6/0	100.00
# Renter Households	0	0	0	6/0	0/0	6/0	100.00

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

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



Grantee Activity Number:	9537
Activity Title:	Acq/Rehab

Activity Category:

Disposition

Project Number:

0001

Projected Start Date:

03/23/2009

Benefit Type:

Direct Benefit (Households)

National Objective:

NSP Only - LMMI

Activity Status:

Under Way

Project Title:

Acquisition General

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

Pima County Community Land Trust (PCCLT)

Overall	Jul 1 thru Sep 30, 2013	To Date
Total Projected Budget from All Sources	N/A	\$6,860,546.52
Total Budget	\$744,042.46	\$6,860,546.52
Total Obligated	\$744,042.46	\$6,605,546.52
Total Funds Drawdown	\$3,199.63	\$5,718,610.57
Program Funds Drawdown	\$0.00	\$4,492,794.76
Program Income Drawdown	\$3,199.63	\$1,225,815.81
Program Income Received	\$123,608.51	\$2,663,452.87
Total Funds Expended	\$213,953.99	\$5,932,590.64
Pima County Community Land Trust (PCCLT)	\$213,953.99	\$5,932,590.64
Match Contributed	\$0.00	\$0.00

Activity Description:

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

Location Description:

Tucson Arizona

Activity Progress Narrative:

Resale Expenditure for this quarter is \$213,953.99.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	1	38/37

	This Report Period	Cumulative Actual Total / Expected
	Total	Total



# of Housing Units	1	34/37
# of Singlefamily Units	1	34/37

Beneficiaries Performance Measures

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

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	1	0	1	27/37	7/0	34/37	100.00
# Owner Households	1	0	1	27/37	7/0	34/37	100.00

Activity Locations

Address	City	County	State	Zip	Status / Accept
6620 S. 10th Avenue	Tucson		Arizona	85756-	Match / N

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

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

