

# The City of Oklahoma City Consolidated Annual Performance and Evaluation Report

Second Action Plan Year  
July 1, 2021 to June 30, 2022



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Presented to the U.S. Department of Housing and Urban Development  
Oklahoma City Field Office

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## CR-05 - Goals and Outcomes

**Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)**

*This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.*

### Executive Summary

The Consolidated Annual Performance and Evaluation Report (the “CAPER”), details the community development related activities and accomplishments of The City of Oklahoma City that have been assisted with resources from the United States Housing and Urban Development Department (HUD) for use in the 2021-22 fiscal year. The FY 2021-22 CAPER covers the reporting period from July 1, 2021 through June 30, 2022. The report describes how the City used Community Development Block Grant (CDBG), Home Investment Partnerships Program (HOME), Emergency Solutions Grant (ESG), and Housing Opportunities for Persons with Aids (HOPWA) funds to help meet community objectives. In addition to the FY 2021-22 formula funding grants, supplemental CDBG-CV, ESG-CV and HOPWA-CV funding was provided under the Federal CARES Act in April 2020 through a Substantial Amendment to the FY 2019-20 Annual Action Plan. Expenditures and accomplishments data for the reporting period are included in this report.

Federal regulations require the CAPER to be submitted to HUD no later than ninety (90) days after the end of the fiscal year which ended on June 30, 2022. The Citizens Committee for Community Development held a public meeting on September 20, 2022 to review accomplishments and accept citizen’s comments on the programs and activities funded during the 2021-2022 Action Year. Notice of the meeting was published on September 4, 2022 in “The Oklahoman”. The CAPER can be accessed online at the City of Oklahoma City’s web site under the Planning Department at <https://www.okc.gov/departments/planning/programs/housing-neighborhood-programs>.

*Continued in Appendix 1*

**Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)**

*Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee’s program year goals.*

*NOTE: Per federal requirements, the Progress Table reflects federally funded outcomes only. Appendix 2 of this document presents FY 2021-2022 accomplishments supported by both local and federal funds. The data in this Table did not populate correctly from IDIS. Actual accomplishments have been manually entered in a revised Table which has been inserted in the Microsoft Word version prepared for public access. The Microsoft Word version is attached in its entirety as a PDF file in the unique appendices. The pre-populated funding data in the table is hard coded and cannot be changed; therefore the screen views in the Econ Planning Suite are inaccurate. The expenditure tables in Appendix 2 represent actual expenditures during the reporting period and may vary greatly from the data appearing in IDIS.*

**Progress Towards Program Goals**

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee's program year goals are listed in the table which follows:

Goal	Category	Source / Amount	Indicators	Unit of Measure	Expected – 5-year Strategic Plan	Actual – Strategic Plan (thru yr.2)	Percent Complete (5 yr)	Expected – Program Year 2	Actual – Program Year 2	Percent Complete (yr.2)
Administration Planning and Fair Housing	Program Administration	CDBG: \$1,030,331 / HOME: \$1,121,574	Other	Other	1780	764	42.92%	450	385	85.86%
Affordable Housing Construction and Development	Affordable Housing	CDBG: \$0.00 / HOME: \$800,000	Rental units constructed	Household Housing Unit	65	58	89.23%	97	0	41.24%
Affordable Housing Construction and Development	Affordable Housing	CDBG: \$0.00 / HOME: \$631,896	Homeowner Housing Added	Household Housing Unit	41	16	39.02%	14	9	64.29%
Affordable Housing Retention and Rehabilitation	Affordable Housing	CDBG: \$235,000 / HOME: \$0.00 / CDBG-CV: \$4,151,551	Rental units rehabilitated	Household Housing Unit	50	100	200.00%	10	13	670.00%
Affordable Housing Retention and Rehabilitation	Affordable Housing	CDBG: \$1,960,000 / HOME: \$737,000	Homeowner Housing Rehabilitated	Household Housing Unit	1035	1441	139.82%	205	87	139.22%

Affordable Housing Retention and Rehabilitation	Affordable Housing	CDBG: \$50,000	Housing Code Enforcement/Foreclosed Property Care	Household Housing Unit	800	200	25%	200	122	61.00%
Economic Development	Non-Housing Community Development	CDBG: \$0.00	Facade treatment/business building rehabilitation	Business	0	0	0.00%	0	0	0.00%
Economic Development	Non-Housing Community Development	CDBG: \$950,000	Jobs created/retained	Jobs	0	89	890.00%	50	89	178.00%
Economic Development	Non-Housing Community Development	CDBG: \$40,000 /CDBG-CV \$91,787	Businesses assisted	Businesses Assisted	960	447	46.56%	160	230	143.75%
Elimination of Slum and Blight	Non-Housing Community Development	CDBG: \$220,000	Housing Code Enforcement/Foreclosed Property Care	Household Housing Unit	750	314	41.87%	650	143	22.00%
General Public Services-CDBG	Affordable Housing Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$257,733	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	207,575	129,970	62.61%	53,500	63,930	119.50%
General Public Services-CDBG	Affordable Housing Non-Homeless Special Needs Non-Housing Community Development	CDBG-CV: \$91,787.23	Public service activities	businesses Assisted	0	75	750.00%	100	75	75.00%
General Public Services-CDBG	Affordable Housing	CDBG-CV: \$48,381.71	Other	Other	200	626	313.00%	200	626	313.00%

	Non-Homeless Special Needs Non-Housing Community Development									
Homebuyer Financial Assistance	Affordable Housing	HOME: \$0.00	Homeowner Housing Added	Household Housing Unit	0	7	700.00%	0	0	100.00%
Homebuyer Financial Assistance	Affordable Housing	HOME: \$625,000	Direct Financial Assistance to Homebuyers	Households Assisted	150	47	31.33%	30	15	50.00%
Public Facilities and Infrastructure	Non-Housing Community Development	CDBG: \$2,356,800	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	2000	6873	343.65%	5,778	4,873	84.33%
Public Facilities and Infrastructure	Non-Housing Community Development	CDBG: \$478,535	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	Households Assisted	6	2	33.33%	0	0	0.00%
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	ESG: \$ 456,596/ ESG-CV \$5,017,512	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	5900	16,718	283.4%	1180	13,721	1,162.80.00%
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$ / ESG: \$ / ESG-CV: \$ / HOPWA- CV: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	2075	649	31.28%	422	0	0.00%
Support for the Homeless	Affordable Housing Homeless	HOPWA: \$ / ESG: \$ / ESG-CV: \$ /	Homeless Person Overnight Shelter	Persons Assisted	9290	691	7.44%	1200	0	0.00%

	Non-Homeless Special Needs	HOPWA-CV: \$								
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$ / ESG: \$ / ESG-CV: \$ / HOPWA-CV: \$	Overnight/Emergency Shelter/Transitional Housing Beds added	Beds	645	0	0.00%	117	0	0.00%
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	ESG: 74,480 / ESG-CV: \$1,214,052	Homelessness Prevention	Persons Assisted	2625	470	17.90%	250	335	134.00%
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$837,716	Housing for People with HIV/AIDS	Household Housing Unit	1250	411	32.88%	422	219	51.90%
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$741,176	HIV/AIDS Housing Operations	Household Housing Unit	1750	396	22.63%	35	339	968.57%
Support for the Homeless	Affordable Housing Homeless Non-Homeless Special Needs	CoC and City Social Services Grants	Other	Other	0	1002	1002.00%	1180	1,002	84.92%

**Table 1 - Accomplishments – Program Year & Strategic Plan to Date**

**Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.**

The City of Oklahoma City identified two (2) priority areas in the 2020-24 Consolidated Plan. These included three (3) Strong Neighborhoods Initiative (SNI) neighborhoods and the Neighborhood Revitalization Strategy Area (NRSA). The City of Oklahoma City expended \$6,994,605.02 in CDBG funds, including general administration and planning, on activities and projects identified in the Plan. An additional \$2,347,296.74 in CDBG-CV funds was expended to assist in COVID-related needs including housing assistance and support for non-profit corporations. HOME funds in the amount of \$1,286,971.44, including administration, were expended on eligible activities. Aggregate spending within the NRSA represented 76% of all expenditures. Activities within the priority target areas included homebuyer's down payment assistance, new home construction, housing rehabilitation, construction of public infrastructure and elimination of slum and blight. In addition to the expenditure of entitlement funding and program income, The City of Oklahoma City also supported additional activities using Continuum of Care funding and municipal social services grants.

**CR-10 - Racial and Ethnic composition of families assisted**

**Describe the families assisted (including the racial and ethnic status of families assisted).**

**91.520(a)**

	<b>CDBG</b>	<b>HOME</b>	<b>HOPWA</b>	<b>ESG</b>
White	38,913	9	77	2,668
Black or African American	33,373	10	73	1,836
Asian	658	1	1	15
American Indian or American Native	4,104	0	8	381
Native Hawaiian or Other Pacific Islander	37	0	3	39
<b>Total*</b>	<b>77,085</b>	<b>20</b>	<b>175***</b>	<b>4,939***</b>
Hispanic	5,527	0**	15	478
Not Hispanic	82,590	0**	160	4,981
<b>TOTAL</b>	<b>77,085</b>	<b>20</b>	<b>162</b>	<b>4,939</b>

**Table 2 – Table of assistance to racial and ethnic populations by source of funds**

**Narrative**

\* The CDBG and HOME numbers in the above table concerning racial status were manually entered based on information from the PR-23 Reports attached in Appendix 3. Please note that these numbers include a combination of households (for housing beneficiaries) and persons (for non-housing services), as this is how the reports are structured. The CDBG numbers in the table include both formula grants and CV beneficiaries. In addition to those listed, there were 11,032 CDBG and CDBG-CV beneficiaries reported as other various racial mixes and ethnicities which are not compatible with choices the IDIS template above. The above table did not prepopulate in the CAPER template printed from IDIS as in past years. The HOME PR-23 does not provide date on which beneficiaries identified as Hispanic.

HOPWA and ESG information has been manually entered based on available data as presented in the



SAGE ESG and HOPWA CAPER Reports.

\*\*\*Table 2 template does not include all racial designations reported in HMIS for the ESG and HOPWA programs, and therefore is not representative of the total families served. Due to this omission, the totals reflected in the above table *exclude* individuals identifying as "other multi-racial", clients refusing to provide information, data not collected and/or multi-racial combinations that do not conform to the available fields in the table.

There were 149 individuals (ESG) who failed to disclose this information or the information was otherwise missing from data entered in HMIS at intake; and 481 who identified as other multi-racial. A total of 23 persons either didn't know or refused to disclose if they were of Hispanic ethnicity. This data was not collected for 80 persons. There were an additional 8,135 persons assisted with ESG-CV. Those reports are submitted in SAGE quarterly, and have been attached with the ESG CAPER.

In the HOPWA CAPER, two (2) persons reported as Other Multi-Racial, One (1) as Asian and White, Four (4) Black/African American and White, and four (4) persons as American Indian/Alaskan Native & Black/African American.

The data in the PR-23 reports may include racial and ethnic details for activities completed near the end of the 2021-22 program year that were not entered as accomplishments until after the start of the FY 2022-23 Third Action Plan Year. Data for the Housing Opportunities for Persons With AIDS (HOPWA) program was submitted by service providers and indicates that 558 persons were served. Fifty-four persons were assisted with HOPWA-CV funds during the program year.

## CR-15 - Resources and Investments 91.520(a)

### Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	10,560,324	6,990,605
HOME	public - federal	7,539,421	1,286,791
HOPWA	public - federal	1,578,893	893,126
ESG	public - federal	456,595	356,274
CDBG-CV	public - federal	4,644,267	2,347,297
ESG-CV	public - federal	5,017,512	2,906,056
HOPWA-CV	public - federal	88,186	40,698
HOME ARP	public - federal	422,155	0
<b>TOTAL</b>		<b>30,307,353</b>	<b>14,820,847</b>

Table 3 - Resources Made Available

### Narrative

All grant funds are intended to be disbursed timely. The unexpended end balance of the City's CDBG program at fiscal year-end was \$3,569,719.17 as reflected on the PR-26 Report. When compared against the City's FY21 funding allocation of \$5,011,531, the CDBG expenditure ratio is within the 1.5 times annual

allocation ratio required by HUD (1.40). The CDBG letter of credit balance was \$3,633,302.67 at the end of the FY 2021-22 reporting period. A financial summary reconciliation report is provided in Appendix 3. With regard to HOME, the City is 100% committed as of the July 31, 2021 commitment deadline. The City's actual expenditures, after completion of the June 2021 final draws, are consistent with the letter of credit. All financial expenditure records are maintained in the City's accounting system and are reflected in the HUD letter of credit disbursements balance. The City is in compliance with its HOME commitments, disbursements, and reservation requirements. Total expenditures exceeding resources made available for FY 2021-22 are attributable to funds carried forward from prior years and/or reallocation of program income.

**The "Resources Made Available" column in the above table represents the the projected available funding for each program as reported in the 2021-22 Second Action Year Plan.** These funds are inclusive of formula grant funding, unallocated and anticipated program income, and funds carried forward for activities from prior years. The amount expended during the program year may vary from actual allocations due to the timing of project completions from prior years, and the unanticipated receipt of additional program income. All funds made available and amount expended for each activity have been detailed in the Final Expenditures and Accomplishments report (Appendix 2).

**Identify the geographic distribution and location of investments**

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
NEIGHBORHOOD STRATEGY AREA	80%	76%	Excludes Public Service Activities

**Table 4 – Identify the geographic distribution and location of investments**

**Narrative**

The City of Oklahoma City identified two (2) strategic target areas in the 2020-2024 Five Year Consolidated Plan. The Consolidated Plan provides for the continuation of the Neighborhood Revitalization Strategy Area (NRSA). The NRSA is a targeted area for investment of formula grant funds. NRSA's by definition are disadvantaged areas with a high concentration of low to moderate income residents. Communities are offered enhanced flexibility in approved NRSA areas in undertaking economic development, housing, and public service activities with their CDBG funds. This flexibility is designed to promote innovative programs in economically disadvantaged areas. The policies contained in the Consolidated Plan recommend, to the greatest extent possible, investment of 80% of HOME and CDBG funding to program activities in the NRSA.

The boundaries of the NRSA were established through an intensive citizen participation exercise undertaken for the purposes of applying for designation by HUD as an Empowerment Zone/Enterprise Community. Three sub-strategy areas *located within the NRSA* have been further designated as focus areas for concentrated revitalization efforts. The sub-strategy areas have been targeted for reinvestment by The City of Oklahoma City for reinvestment under the Strong Neighborhoods Initiative Program (SNI). The current SNI Neighborhoods include Capital Hill, Capitol View, and Metro Park. *Exclusive of administration expenses*, 76% of federal CDBG and HOME funds were expended on projects and activities within the NRSA and SNI neighborhoods during the program year.

## Leveraging

**Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.**

The City has a Community Housing Development Organization (CHDO) set-aside that includes the 15% CHDO statutory minimum for FY 2021-22, and a pool of HOME funds loaned to CHDOs for new home construction and rehabilitation/sale activities. CHDOs are encouraged to utilize private bank financing along with the CHDO loan pool of HOME funds in providing affordable housing. Proposals for new projects are accepted when the CHDO has completed all previously funded projects.

The City facilitates the transfer at no cost, of Oklahoma County owned vacant lots to nonprofit organizations for the construction of affordable housing. The lots are provided to the City through an agreement with Oklahoma County. CHDOs are the primary recipients of these lots. Down payment assistance provided to low income homebuyers from HOME funds is heavily leveraged with private financing and other resources.

*Continued in Appendix 1*

<b>Fiscal Year Summary – HOME Match</b>	
1. Excess match from prior Federal fiscal year	\$9,411,158.38
2. Match contributed during current Federal fiscal year	\$ 0.00
3 .Total match available for current Federal fiscal year (Line 1 plus Line 2)	\$9,411,158.38
4. Match liability for current Federal fiscal year	\$0.00
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	\$9,411,158.38

**Table 5 – Fiscal Year Summary - HOME Match Report**

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match
NONE								

Table 6 – Match Contribution for the Federal Fiscal Year

**HOME MBE/WBE report**

Program Income – Enter the program amounts for the reporting period				
Balance on hand at beginning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
\$0.00	\$84,496	\$84,496	\$0.00	\$0.00

Table 7 – Program Income

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period						
	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
<b>Contracts</b>						
Number	9	0	0	3	0	6
Dollar Amount	\$1,652,073.00	0	0	\$77,503.70	0	\$1,574,569.30
<b>Sub-Contracts</b>						
Number	13					
Dollar Amount	\$497,701.46	0	0	0	\$17,613.10	\$452,088.36

	<b>Total</b>	<b>Women Business Enterprises</b>	<b>Male</b>
<b>Contracts</b>			
Number	6	4	2
Dollar Amount	\$701,503.70	\$638,531.70	\$62,972.00
<b>Sub-Contracts</b>			
Number	4	0	4
Dollar Amount	\$17,613.10	0	17,613.10

**Table 8 - Minority Business and Women Business Enterprises**

<b>Minority Owners of Rental Property</b> – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	<b>Total</b>	<b>Minority Property Owners</b>				<b>White Non-Hispanic</b>
		<b>Alaskan Native or American Indian</b>	<b>Asian or Pacific Islander</b>	<b>Black Non-Hispanic</b>	<b>Hispanic</b>	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

**Table 9 – Minority Owners of Rental Property**

<b>Relocation and Real Property Acquisition</b> – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition		
Parcels Acquired	0	0
Businesses Displaced	0	0
Nonprofit Organizations Displaced	0	0
Households Temporarily Relocated, not Displaced	0	0

Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

**Table 10 – Relocation and Real Property Acquisition**

## CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	0	0
Number of Non-Homeless households to be provided affordable housing units	51	18
Number of Special-Needs households to be provided affordable housing units	90	0
<b>Total</b>	<b>141</b>	<b>18</b>

Table 11 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	422	134
Number of households supported through The Production of New Units	111	3
Number of households supported through Rehab of Existing Units	215	100
Number of households supported through Acquisition of Existing Units	54	54
<b>Total</b>	<b>802</b>	<b>291</b>

Table 12 – Number of Households Supported

### Discuss the difference between goals and outcomes and problems encountered in meeting these goals.

Significant progress has been made towards meeting the goals and objectives contained in the 2020-2024 Consolidated Plan, and the First and Second Action Year Strategies. The City of Oklahoma City has made progress in providing affordable housing for rental and owner households funded with HOME and CDBG. However, all programs continue to be negatively impacted by supply chain shortages and price increases in services and materials. Some projects have been delayed due to such factors. The shortage of available housing units has also affected efforts to place persons in housing.

The City assisted 102 home ownership units with CDBG through the Oklahoma City Housing Assistance Program's Home Exterior Maintenance program (33 units), and the Emergency Home Repair program managed by Community Action Agency which completed forty-eight (48) home repairs. Thirteen (13) public housing unit modifications were completed.

Under the HOME program, three (3) CHDO housing units were constructed and sold to low income households and an additional eight (8) units are underway. In addition, the City provided HOME funding for down payment and closing cost assistance for fifteen (15) households, and supported the interior and exterior rehabilitation of six (6) houses under the Housing Assistance Program.

*Continued in Appendix 1*

**Discuss how these outcomes will impact future annual action plans.**

The City of Oklahoma City annually assesses its progress in meeting goals outlined in the 2020-2024 Consolidated Plan through development of the Consolidated Annual Performance Evaluation Report (CAPER). The CAPER provides an opportunity for the City to evaluate the performance of its programs and services, and to determine whether adjustments to the current 5-year goals are needed. The City looks to performance in a given year, and trends over time, to inform and calibrate future goals and outcomes. The City will continue to prioritize homeownership opportunities for low to moderate income families with 80% of available funding targeted within the NRSA.

**Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity.**

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	37	7
Low-income	26	2
Moderate-income	16	11
<b>Total</b>	<b>79</b>	<b>20</b>

**Table 13 – Number of Households Served**

**Narrative Information**

The data in Table 13 above may not be inclusive of all households served due to the timing of reporting in the HUD IDIS reporting system. Data has been assimilated from the CDBG and HOME PR-23 reports. Please note that the CDBG and HOME programs report income levels differently. The data in the CDBG fields reflects those between 0-30% AMI as Extremely Low, 30-50% as Low, and 50-80% as Moderate income. By contrast, data in the HOME fields reflect those between 0-30% as Extremely Low, 31-60% as Low, and 61-80% as Moderate income.

**CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)  
Evaluate the jurisdiction’s progress in meeting its specific objectives for reducing and ending homelessness through: Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

The Oklahoma City Continuum of Care and partnering agencies actively work to recruit landlords willing to house program recipients. The City recognizes that the prevention of homelessness is a more efficient and less costly mechanism of support than back end services. As a result, the City has taken action to



foster and maintain affordable housing by establishing programs and by providing funding to assist nonprofit and for-profit housing developers to rehabilitate and construct new affordable housing; supporting the City's Continuum of Care program by providing funding for the construction and rehabilitation of permanent supportive housing for the homeless when opportunity and resources allow; assisting the Oklahoma City Housing Authority by providing CDBG funds to modernize public housing units; providing funding to assist with the rehabilitation and construction of rental housing; and, providing funding for activities that support housing and services for persons with HIV/AIDS and homeless.

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

The City of Oklahoma City received a total allocation of \$427,463 in ESG funding for Fiscal Year 2021-22. Thirteen (13) activities, excluding administration, were funded for thirteen (13) agencies in the amount of \$470,639.01 (inclusive of funds carried forward from the prior program year). The agencies provided emergency shelter and transitional housing to mentally ill persons, victims of elder abuse, youth, and victims of domestic violence. A total of 5,280 homeless individuals and families have been provided with services. A total of 129 homeless youth were provided services during the reporting period.

In addition to the ESG formula grant funding, an additional \$2,906,056.35 in supplemental ESG-CV funds was expended in the Second Action Plan year. Fourteen (14) non-profit service agencies received operational assistance. 8,135 persons received support for pandemic-related housing and shelter activities.

### **Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs**

The City of Oklahoma City, through the Continuum of Care with our partnering agencies, provides rental assistance, Counseling, and legal assistance to assist families in retaining housing. Homelessness prevention activities are supported with CoC, ESG, and HOPWA funding, as well as social services grants. These programs are detailed in Appendix 1.

The City also used CDBG formula grant funds to provide legal assistance to families facing eviction or foreclosure. A total of ninety (90) households were assisted during the reporting period.

### **Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were**

## **recently homeless from becoming homeless again**

The Oklahoma City Planning Department is the lead entity/collaborative applicant for the Continuum of Care (CoC) planning process. The Planning Department serves as a permanent member of the Continuum of Care Board (CCB), provides technical support to Continuum of Care funded agencies, writes the consolidated application, and serves on the Governor's Interagency Council on Homelessness. Through the efforts of the Continuum of Care Board (CCB), the City supports an effective consortium of agencies, organizations and individuals to perfect the evolving Continuum of Care. The City's objectives are:

1. Promoting addition of permanent supportive housing stock for the chronically homeless by educating the community on the housing first strategy and using local Social Services funds to provide match;
2. Developing cooperative, supportive links among existing programs and provider agencies;
3. Integrating new programs and services;
4. Responding to identified gaps and emergency issues; and,
5. Coordinating the funding of all grants related to the needs of the homeless.

*Continued in Appendix 1*

## **CR-30 - Public Housing 91.220(h); 91.320(j) Actions taken to address the needs of public housing**

The City allocates CDBG funds for the rehabilitation of low-income public housing units. During the program year, the Oklahoma City Housing Authority (OCHA) rehabilitated thirteen (13) public housing units with \$235,000 in CDBG funds.

The City of Oklahoma City Planning Department staff, as part of its outreach activities in the SNI neighborhoods, participates in the presentation of Fair Housing and legal education workshops which include discussion of homeownership opportunities and landlord/tenant issues. OCHA staff conducts periodic seminars which include Homebuyer Education Classes to increase awareness about housing programs among participants in the Oklahoma City Housing Authority's Family Self Sufficiency Program, Section 8 Homeownership Program, and Individual Development Accounts Program as well as with other nonprofit Organizations. Information packets are provided to attendees that contain brochures and flyers of various home ownership services.

The Housing Authority has established resident involvement programs that include resident councils and family self-sufficiency programs. OCHA also has programs in both the public housing and Section 8 programs to assist residents in becoming homeowners.

## **Actions taken to encourage public housing residents to become more involved in management and participate in homeownership**

OCHA encourages upward mobility for all Section 8 and Public Housing families. Tenants are encouraged to participate in the Family Self-Sufficiency Program (FSS), a voluntary program for Section 8 residents that assist families in improving their economic situation and reducing their dependency on public assistance. The FSS is designed for those who are unemployed or underemployed. Each participant creates a five (5) year plan that includes employment goals and identifies training and/or educational needs. FSS

staff assist participating households in identifying, locating, and arranging for the services they need to accomplish their goals. Services may include child care, education, transportation, personal development, resumes, job training and/or placement. As FSS participants succeed in raising their family income, the portion of their monthly income contributed toward their Section 8 rent payment also increases. HUD regulations allow a percentage of this rent increase to be deposited into an interest-bearing account for the participating family. When a family achieves its goals and "graduates" from welfare assistance for a minimum period of twelve (12) months, they are awarded the accumulated funds in their FSS account. These funds may be used to make a down payment on a home purchase, or to start a new business.

OCHA also operates a Section 8 Homeownership Program to assist eligible tenants in the purchase of a home by offering monthly homeownership assistance towards monthly payments. Participating families are required to demonstrate satisfactory rental history, minimum income requirements, and steady employment. All applicants must pass a preliminary credit screening process and complete a homebuyers education course.

OCHA continually seeks opportunities to address capital needs and improvements through the use of HUD's Rental Assistance Demonstration program. OCHA is committed to preserving and improving public housing properties, and pursues grant and financing opportunities to improve properties and strengthen the quality of life and services for tenants.

### **Actions taken to provide assistance to troubled PHAs**

The Oklahoma City Housing Authority is designated a high performer and is not identified as a troubled PHA; therefore no assistance was required.

### **CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)**

**Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)**

Some of the barriers affecting the cost of providing affordable housing relate to policies or codes of the jurisdiction. In recent years, the City has taken steps to establish policies that are favorable to the production of affordable housing. The actions included:

- Adoption of the International Existing Building Code – Code applies to multi-family housing and reduces financial barriers to renovating existing building by allowing greater flexibility in materials used in the renovation.
- The City does not require engineering or architectural seals for developers to construct single-family housing (*See notes in Appendix 1*).
- The cost for remediation of lead paint through the City's Housing Assistance Program and other HOME assisted projects is provided to income-qualified households and developers in the form of a grant.
- The City contracted with Root Policy Research to update its Analysis to Impediments to Fair Housing Choice. The update was completed January 31, 2020 and is included in the City's 2020-2024 Consolidated Plan. This study included suggestions for code revisions in support of

affordable housing. The City is currently engaged in a comprehensive code review and rewrite and the suggestions will be considerations for potential revisions.

- The City also provided CDBG funds for Economic & Planning Systems, Inc. to perform a Comprehensive Housing Affordability Study for Oklahoma City, to identify recommendations to increase the quality and quantity of affordable housing in our community. That study and the accompanying recommendations was completed in Fall 2021. This study also included suggestions for code revisions in support of affordable housing. The City is currently engaged in a comprehensive code review and rewrite and the suggestions will be considerations for potential revisions.

Grants management staff continues to monitor and comment on changes in policy or codes that could have an adverse impact on the production of affordable housing.

### **Actions taken to address obstacles to meeting underserved needs. 91.220(k); 91.320(j)**

Worst-case housing needs are addressed through programs that include funding for nonprofit housing providers, and Affordable Housing Development Programs and Rental Housing programs as outlined in the Consolidated Plan. In addition, the City, in all affordable housing development solicitations, gives priority to projects that serve special populations and persons with disabilities. The Oklahoma City Continuum of Care, the Oklahoma City Housing Authority, and the City's Supportive Services for Veteran's Families (SSVF) provider are working together to actively recruit landlords to house homeless veterans. SISU Youth continues to operate a 12-bed shelter and drop-in center for homeless youth, and routinely exceed their nightly capacity. Discussions for additional youth facilities are ongoing. In the FY 2022-23 Third Action Year Plan, the City provided a \$1M grant in CDBG funds to support SISU in renovating a building to serve as a new and expanded youth shelter and resource center.

### **Actions taken to reduce lead-based paint hazards. 91.220(k); 91.320(j)**

The Oklahoma City Council has an adopted Lead-based Paint Policy that provides for compliance with the requirements of 24 CFR Part 35 regarding assessment and treatment of lead-based paint hazards.

All City housing rehabilitation inspectors are certified by the Oklahoma State Department of Environmental Quality as lead-based paint Inspectors/Risk Assessor and/or Supervisor, and certified by the U.S. Environmental Protection Agency as Renovator/Remodeler. All properties, where Federal funds are granted or loaned by the City for housing rehabilitation, are inspected for lead based paint. The inspection includes a specific section for determining what remediation steps need to occur to clear the property. Work specifications are prepared and the remediation work is included in the rehabilitation bids from State Certified contractors.

The City completed thirty-three (33) exterior maintenance projects, six (6) whole house rehabilitation projects, and forty-eight (48) emergency home repair projects in the 2021-22 Action Plan Year. Emergency home repair is a program activity conducted for the City by a sub-grantee capable of performing lead-based paint responsibilities. Additionally, sub-grantees, nonprofit borrowers, CHDOs, and other funding recipients carry out lead-based paint responsibilities directly or through the City's certified inspectors.

### **Actions taken to reduce the number of poverty-level families. 91.220(k); 91.320(j)**

The City's antipoverty strategy includes increasing employment opportunities, providing housing opportunities for low and moderate-income persons, and providing supportive services and housing assistance to homeless persons and families through public investment of local and federal resources.

The City is utilizing CDBG and Section 108 Loan Guarantee funds to stimulate the local economy and create jobs. In the past years, the City invested Section 108 and Economic Development Initiative grant funds in the redevelopment of the historic Skirvin Hotel, the American Indian Cultural Center, Dell, Inc. Business Service Center, the Embassy Suites Hotel, the 21C Museum Hotel, the First National Bank restoration, and to establish a small business assistance revolving loan fund. All projects were located in the Neighborhood Revitalization Strategy Area. The job creation programs have been responsible for the creation of approximately 2,200 jobs available to lower-income persons. All jobs qualify for the presumption of low and moderate income.

During the 2021-22 reporting period, the City completed a Section 108 loan for a local developer to assist in the rehabilitation of the historic First National Building, a mixed-use project consisting of a hotel, condominiums, and retail operations. To date, sixty-four (64) jobs have been created. An additional 161 jobs are expected as the project reaches stabilization. A prior Section 108 loan to the 21C Hotel and Museum resulted in 25 FTE jobs during the reporting period.

*(Continued in Appendix 1)*

### **Actions taken to develop institutional structure. 91.220(k); 91.320(j)**

The City has an on-going institutional structure for the provision of housing assistance to lower-income persons and special populations. The Oklahoma City Housing Authority, Community Housing Development Organizations, nonprofit and for-profit housing providers provide housing services. A brief list of activities that were funded in the 2021-22 Action Year Plan includes:

- Oklahoma City Housing Authority rehabilitated thirteen (13) public housing units with \$235,000 in CDBG funds.
- Community Action Agency received \$660,000 in CDBG funds to conduct emergency home repairs to assist lower-income persons. 48 emergency home repairs were completed.
- City of Oklahoma City Housing Assistance Program was allocated \$737,000 in HOME funding and \$1.3 million in CDBG funds to provide program delivery and housing rehabilitation services to lower-income persons. Thirty-three (33) Housing Exterior Maintenances and six (6) whole house rehabilitations were completed.
- Community Action Agency and Neighborhood Housing Services provided down payment and closing cost assistance to prospective lower income homeowners utilizing HOME grant funding. A total of fifteen (15) down payment and closing cost assistance transactions were completed.
- Neighborhood Housing Services CHDO did not complete a unit during the program year. One (1) unit is underway.
- Jefferson Park CHDO provided housing opportunities for lower-income persons through purchase/rehabilitation and new construction (Three units completed; Four units (4) underway).
- Oklahoma City Housing Services Redevelopment Corporation CHDO (d/b/a Positively Paseo) did not complete a unit during the reporting period; (3 units are underway).

- Ninety (90) assisted living units at Creston Park were expected to be completed by the Oklahoma City Housing Authority under the HOME Affordable Housing Development program. This project has been delayed but is expected to begin Spring of 2023.

The City will continue to enhance institutional structures by making local and federal resources available to agencies to address homelessness, the provision of social services, affordable housing, and economic development.

**Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)**

The City allocates CDBG funds for the rehabilitation of low-income public housing units. During the program year, the Oklahoma City Housing Authority (OCHA) rehabilitated thirteen (13) public housing units with \$235,000 in CDBG funds. Additionally, OCHA and City staff meet periodically to discuss local affordable housing needs and issues, as well as opportunity areas for future housing development. During the FY 2019-20 program year, the City and the Housing Authority entered into agreement for the City to provide housing inspection services to OCHA in its RAD conversion projects. 122 units were inspected during the Second Action Plan year reporting period.

The Oklahoma City Housing Authority has established resident involvement programs that include resident councils and family self-sufficiency programs. The Housing Authority also has programs in both the public housing and Section 8 programs to assist residents in becoming homeowners.

**Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)**

The City is committed to affirmatively furthering fair housing, and contracts annually with the Metropolitan Fair Housing Council to monitor and investigate housing discrimination complaints. During the 2021-22 reporting period, the Metropolitan Fair Housing Council received 385 landlord/tenant intakes that resulted in the filing of nineteen (19) formal housing discrimination complaints. In addition, MHFC collected \$4,400 in the Second Action Plan Year for complainants through in-house mediations.

Metropolitan Fair Housing also processed thirty-one (31) requests for reasonable accommodation or modification. In addition, Metro Fair Housing Council conducted thirty-two (32) educational seminars and trainings for first-time homebuyers, public and private housing providers and faith-based housing providers. These activities speak directly to improving the understanding of, and enhance attention to compliance with Fair Housing law.

In addition to the Metropolitan Fair Housing activities, City SNI Planning staff hosted an SNI Resources Fair in Fall 2021, and an SNI Housing and Legal Workshop for Renters in April 2021 in which MFHC participated. Information was shared at each of these these functions about Fair Housing law, housing discrimination, and available resources for Fair Housing complaint investigations. A resources directory is made available on the SNI Facebook page, and staff continues working with neighborhood groups to provide Fair Housing Education and outreach.

A new Analysis of Impediments to Fair Housing Choice was completed for The City of Oklahoma City by Root Policy Research in January 2020, and used to inform the 2020-24 Five Year Consolidated Plan period beginning on July 1 2020. A new Analysis of Impediments was completed to inform the 2020-2024 Consolidated plan, and a new study on affordable housing needs in our community was completed in the Fall of 2021.

*Continued in Appendix 1*

## **CR-40 - Monitoring 91.220 and 91.230**

**Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements**

Oklahoma City monitors all activities funded with federal grants and a compliance review is conducted for all sub-recipients on an annual basis. The City in turn is monitored by the funding agency and undertakes an annual A-133 independent audit. During the City's HUD monitoring of the CDBG and HOME programs, no findings or concerns were issued. The 2020-21 A-133 Single Audit Report for the City reported three findings for the CDBG, HOME, ESG or HOPWA programs. All reporting was completed prior to completion of the audit. The A-133 single audit for the City's fiscal year 2021-22 will begin in October or November 2021. Findings in the 2020-21 report included errors in the calculation of employee time allocations, discrepancies between the HUD PR-29 quarterly report and the City's accounting records, and delinquent submission of FFATA reporting. Corrective actions have been implemented in each instance to address the underlying issues for non-compliance.

Monitoring of subgrantees is performed for each activity to ensure compliance with requirements of the program.

1. Desk monitoring is performed throughout the program year. Each reimbursement request is reviewed for eligibility, documentation support, and eligibility of expenditures. Beneficiary reports are required per the terms of each agreement throughout the period of reimbursement.
2. Spending levels are monitored throughout the grant year to ensure that funds are expended timely and the year-end goals are met.
3. On-site monitoring is regularly performed on subgrantee contracts as prioritized by risk. Areas reviewed include (as needed, but not limited to): conformance to the subgrantee agreement; record retention system; financial management systems, evidence of insurance, adequate procurement, and compliance with all federal cross-cutting requirements.

The Housing and Community Development Division of the Oklahoma City Planning Department is responsible for the development and implementation of the Consolidated Plan. The Planning Department ensures compliance with program and Consolidated Plan requirements through oversight activities of the Citizen's Committee for Community Development which holds public meetings to discuss the Consolidated Plan, Annual Action Plans and the program accomplishments. Programs are additionally

subject to internal accounting and auditing procedures, as well as annual external auditing and HUD monitoring.

### **Citizen Participation Plan 91.105(d); 91.115(d)**

#### **Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.**

The Citizens Committee for Community Development (CCCD) was formally created by the City Council to provide a forum for citizen involvement with regard to community development related issues. Specifically, the Citizen's Committee reviews CDBG proposals and changes in CDBG program activities regarding the Consolidated Plan and makes funding recommendations to City Council. These meetings are open to the public. In compliance with the City's Citizen Participation Plan, the final year-end expenditures, financial statements and CAPER accomplishments with beneficiary data and accomplishments were provided to the CCCD for the Committee's review and public comment on September 20, 2022. The September 20th public meeting notice was published in *The Oklahoman* on September 4, 2022 and Citizen's were afforded a fifteen (15) day comment period in which to submit comments to staff. Accommodations were made for disabled citizens. The draft document was made available on the City's website for public review.

*(Continued in Appendix 1)*

### **CR-45 - CDBG 91.520(c)**

#### **Specify the nature of, and reasons for, any changes in the jurisdiction's program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.**

The Community Development Block Grant (CDBG) Program is authorized under Title I of the Housing and Community Development Act of 1974 as amended. The primary objective of CDBG is the development of viable communities by providing decent housing, providing a suitable living environment, and expanding economic opportunities. To achieve these goals, any activity funded with CDBG must benefit low and moderate income persons, aid in the prevention of slums and blight, or meet a specific urgent need.

A Substantial Amendment to the 2020-21 Annual Action Plan was approved by City Council on January 4, 2022. The amendment authorized an additional \$4,151,551 in CDBG-CV3 funding. It approved a new project from these funds (Taylor Ridge Apartments) at 4759 NW 36<sup>th</sup> Street in the amount of \$4.8 million from the CV3 and regular formula grant funds for acquisition and rehab of a multifamily housing project to benefit formerly homeless and low income persons. The Amendment also authorized the City to receive \$8,443,107 in federal HOME ARP funds; however, at HUD's request the Amendment was resubmitted and approved at \$422,155 which represents 5% of the award. These funds are available to support Administration expenses until an Allocation Plan is received and approved by HUD. The remaining funds will be made available for eligible activities following approval of the Allocation Plan. In addition, a new Emergency Pest Inspection and Treatment Program in the amount of \$24,000 was established with CDBG funds to support whole house rehabs assisted under the HOME program.

A Minor Amendment in early March 2022 reallocated \$20,000 from the CDBG Public Facilities line item to the Abandoned Housing program to meet a funding shortage created by the rising costs of construction



materials.

A second Substantial Amendment to the 2020-21 Annual Action Plan was approved by Council on March 15, 2022. This Amendment authorized a \$600,000 reallocation from the CDBG Public Facilities line item to the Section 108 Loan Program contingency line item, and prepayment of principal in the amount of \$947,000 to HUD to reduce liabilities on outstanding debt. This Amendment also authorized a \$100,000 allocation from the CDBG Public Facilities line item to the OKC Abandoned Housing line item to offset rising construction costs.

A Minor Amendment in April 2022 reallocated \$60,000 from the CDBG Public Facilities line item to the CDBG Emergency Home Repairs Program to offset rising construction costs. In addition, \$5,000 was reallocated from general administration to planning within the Administration project activity.

Beneficiary data reported for the FY 2021-22 Second Action Year plan includes expenditures and accomplishments from these funding sources, in addition to the formula grant funds allocated for the program year. Although linked to the FY 2019-20 Fifth Year Action Plan, accomplishment and expenditures for CV activities will continue to be reported annually in the CAPER until all CV funds are fully expended.

The City of Oklahoma City monitored the expenditure of CDBG funds throughout the year to ensure that funded activities (for the reporting period and prior years), were completed as agreed and that funds were expended timely. In instances where funds were not fully expended, the carryover balance was re-allocated to the subrecipients for expenditure in the FY 2022-23 Third Action Plan Year, or recaptured and reprogrammed as determined necessary by Staff in response to pending commitments and anticipated program demand.

*(Continued in Appendix 1)*

**Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?**

No.

**[BEDI grantees] Describe accomplishments and program outcomes during the last year.**

Not Applicable

**CR-50 - HOME 91.520(d)**

**Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations**

A summary of on-site inspections and required remediation is provided in Appendix 8

**Please list those projects that should have been inspected on-site this program year based upon the schedule in §92.504(d). Indicate which of these were inspected and a summary of**

**issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.**

All HOME rental projects subject to an affordability period were desk-monitored during the program year. There are currently fifty-three (54) activities under an affordability period, consisting of 226 total units. All properties under an affordability period were monitored during the program year due to prior year waivers necessitated by the COVID pandemic. A 20% sampling of units are typically scheduled for inspection at each of the multi-family and SRO properties subject to an on-site compliance review. 100% of the single family units subject to compliance are normally scheduled for inspection during the program year, except in those instances where multiple units are grouped under one activity number. In those instances, a 20% random selection of the units are inspected. Following completion of all inspections, property managers are notified of unit deficiencies and follow-up inspections are made where necessary. Repairs to address noted deficiencies are required and monitored by staff until completed. Most projects, as of June 30, 2022 were in compliance with minimum property standards. Deficiencies and findings are noted in the inspection summary in Appendix 8. Due to contractor shortages and disruptions in the supply chain for materials, some repairs are taking longer than expected.

A desk review was initiated for all 226 HOME-assisted units, including the review of standard lease agreements, review of qualifying income reports as provided by the property managers, review of current rent limits, verification of occupancy status, and review of management reports. Of the projects surveyed, most responded appropriately with no significant findings. Staff continues to follow up on delinquent documentation. Additional findings, if applicable, will be reported in the FY 2022-23 Third Action Plan Year.

**Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units.**

**92.351(b)**

As a recipient of federal funds, the City of Oklahoma City must adopt affirmative marketing procedures and requirements for rental and homebuyer projects containing five (5) or more HOME-assisted units. Affirmative marketing includes actions that provide information and/or otherwise attract eligible persons to an assisted project without regard to race, color, national origin, gender, religious affiliation, familial status or disability. In marketing its programs, The City of Oklahoma City aims to ensure that eligible households have acceptable access and opportunity to participate in all programs and services supported with federal grant funds. In Fiscal Year 2021-22, homebuyer down payment assistance programs, first time homebuyer education and related services were marketed to residents in low to moderate income neighborhoods and to those with limited English proficiency.

Affirmative marketing provisions were contained in all rehabilitation housing assistance information packets and were included in all agreements that provided financial assistance to rental housing programs. DPA program brochures were provided to all Community Action Agency (CAA) Head Start Program participants. Program information was given to prospective homebuyers during CAA's weekly Homebuyer Education classes and during Neighborhood Housing Service's Homebuyer Education classes held twice a month throughout the year. Affordable Housing Programs were also highlighted in numerous monthly Neighborhood Association newsletters, and on The City's Community Development website at <https://www.okc.gov/departments/planning/programs/housing-neighborhood-programs>. The DPA program and for-sale CHDO homes were promoted in the "City News" insert in the water/utility bill

distributed to all utility customers in Oklahoma City. Increased emphasis was placed on the Section 3 requirements, which were included in all operating and development agreements.

Specific programs conducted by the jurisdiction, the Community Housing Development Organizations and other non-profit housing developers, are addressing the issue of affordability for low to moderate income home ownership. The attached HUD IDIS reports in Appendix 3 provide further detail related to the HOME program accomplishments in the 2021-22 program year.

**Refer to IDIS reports to describe the amount and use of program income for projects, including the number of projects and owner and tenant characteristics**

In the 2021-22 program year, The City of Oklahoma City received CDBG program income in the amount of \$399,409.67. This revenue was recognized and has been allocated to eligible activities in the FY 2022-23 Third Year Action Plan. These funds were received through repayments on Section 108 loans. The HOME program recognized program income in the amount of \$84,496.37. These funds have been reprogrammed to eligible activities in the FY 2022-23 Third Year Action Plan.

**Describe other actions taken to foster and maintain affordable housing. 91.220(k) (STATES ONLY: Including the coordination of LIHTC with the development of affordable housing). 91.320(j)**

The City of Oklahoma City is an Entitlement Community. This question applies to STATES ONLY. The City's efforts in fostering and maintaining affordable housing are discussed in Section CR-20 of this report

**CR-55 - HOPWA 91.520(e)  
Identify the number of individuals assisted and the types of assistance provided**

Table for report on the one-year goals for the number of households provided housing through the use of HOPWA activities for: short-term rent, mortgage, and utility assistance payments to prevent homelessness of the individual or family; tenant-based rental assistance; and units provided in housing facilities developed, leased, or operated with HOPWA funds.

<b>Number of Households Served Through:</b>	<b>One-year Goal</b>	<b>Actual</b>
Short-term rent, mortgage, and utility assistance payments	70	89
Tenant-based rental assistance	422	45
Units provided in transitional housing facilities developed, leased, or operated with HOPWA funds	0	0
Units provided in permanent housing facilities developed, leased, or operated with HOPWA funds	0	0
<b>Total*</b>	492	134

**Table 14 – HOPWA Number of Households Served**

**Narrative**

\*There were 558 Total HOPWA beneficiaries. Some households received more than one service.

*Additional Narrative continued in Appendix 1*

**CR-58 – Section 3**

**Identify the number of individuals assisted and the types of assistance provided**

<b>Total Labor Hours</b>	<b>CDBG</b>	<b>HOME</b>	<b>ESG</b>	<b>HOPWA</b>	<b>HTF</b>
Total Number of Activities	3	3	0	0	0
Total Labor Hours	9,100	4,554			
Total Section 3 Worker Hours	4,452	3,426			
Total Targeted Section 3 Worker Hours	1,338	1,742			

**Table 15 – Total Labor Hours**

<b>Qualitative Efforts - Number of Activities by Program</b>	<b>CDBG</b>	<b>HOME</b>	<b>ESG</b>	<b>HOPWA</b>	<b>HTF</b>
Outreach efforts to generate job applicants who are Public Housing Targeted Workers	1				
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.	1	1			
Technical assistance to help Section 3 business concerns understand and bid on contracts.		2			
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.					
Held one or more job fairs.	1	1			
Provided or connected residents with supportive services that can provide direct services or referrals.					

Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.	1	1			
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

**Table 16– Qualitative Efforts - Number of Activities by Program**

**Narrative**

A summary of Section 3 projects is attached in Appendix 7.

**CR-60 - ESG 91.520(g) (ESG Recipients only)**

**ESG Supplement to the CAPER in *e-snaps*  
For Paperwork Reduction Act**

**1. Recipient Information—All Recipients Complete**

**Basic Grant Information**

<b>Recipient Name</b>	OKLAHOMA CITY
<b>Organizational DUNS Number</b>	014104777
<b>EIN/TIN Number</b>	736005359
<b>Identify the Field Office</b>	OKLAHOMA CITY
<b>Identify CoC(s) in which the recipient or subrecipient(s) will provide ESG assistance</b>	Oklahoma City CoC

**ESG Contact Name**

<b>Prefix</b>	Mr
<b>First Name</b>	Chris
<b>Middle Name</b>	0
<b>Last Name</b>	Varga
<b>Suffix</b>	0
<b>Title</b>	Principal Planner

**ESG Contact Address**

<b>Street Address 1</b>	420 West Main
<b>Street Address 2</b>	Suite 920
<b>City</b>	Oklahoma City
<b>State</b>	OK
<b>ZIP Code</b>	-
<b>Phone Number</b>	4052971639
<b>Extension</b>	0
<b>Fax Number</b>	0
<b>Email Address</b>	christopher.varga@okc.gov

**2. Reporting Period—All Recipients Complete**

<b>Program Year Start Date</b>	07/01/2021
<b>Program Year End Date</b>	06/30/2022

**3. Subrecipient Form – Complete one form for each subrecipient**

**Subrecipient or Contractor Name:** THE CITY OF OKLAHOMA CITY

**City:** Oklahoma City

**State:** OK

**Zip Code:** 73102

**DUNS Number:** 014104777

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Unit of Government

**ESG Subgrant or Contract Award Amount:** \$29,948

**Subrecipient or Contractor Name:** Heartline

**City:** Oklahoma City

**State:** OK

**Zip Code:** 73157

**DUNS Number:** 141236104

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$18,000

**Subrecipient or Contractor Name:** YWCA

**City:** Oklahoma City

**State:** OK

**Zip Code:** 73112

**DUNS Number:**

**Is subrecipient a victim services provider:** Y

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$27,000

**Subrecipient or Contractor Name:** Sunbeam Family Services

**City:** Oklahoma City

**State:** OK

**Zip Code:** 73103

**DUNS Number:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$12,523

**Subrecipient or Contractor Name:** Legal Aid Services of Oklahoma

**City:** Oklahoma City

**State:** OK

**Zip Code:** 73106

**DUNS Number:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$14,000 and \$19,850

**Subrecipient or Contractor Name:** The Homeless Alliance  
**City:** Oklahoma City  
**State:** OK  
**Zip Code:** 73106  
**DUNS Number:** 189040509  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** \$85,000 and \$48,000 and \$17,000

**Subrecipient or Contractor Name:** Upwards Transitions  
**City:** Oklahoma City  
**State:** OK  
**Zip Code:** 73106  
**DUNS Number:** 052487717  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** \$51,376

**Subrecipient or Contractor Name:** Community Health Centers  
**City:** Spencer  
**State:** OK  
**Zip Code:** 73084  
**DUNS Number:** 808772073  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** \$27,417

**Subrecipient or Contractor Name:** Mental Health Association Oklahoma (MHAO)  
**City:** Oklahoma City  
**State:** OK  
**Zip Code:** 77119  
**DUNS Number:**  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** \$91,755.88

**Subrecipient or Contractor Name:** SISU Youth  
**City:** Oklahoma City  
**State:** OK  
**Zip Code:** 73112  
**DUNS Number:**  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** \$10,000

**Subrecipient or Contractor Name:** PIVOT  
**City:** Oklahoma City  
**State:** OK



**Zip Code:** 73105

**DUNS Number:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$11,094

**Subrecipient or Contractor Name:** Neighborhood Services Organization

**City:** Oklahoma City

**State:** OK

**Zip Code:** 73139

**DUNS Number:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$13,000

***NOTE: In reference to Section CR-65 appearing below, please note the following:***

**Guidance received from the U.S. Department of Housing and Urban Development, (HUD) has advised that the CR-65 Screen is no longer applicable. All accomplishment and expenditure data for ESG funding appears in the attached SAGE Report (Appendix 5).**

## CR-65 - Persons Assisted

### 4. Persons Served

#### 4a. Complete for Homelessness Prevention Activities

Number of Persons in Households	Total
Adults	
Children	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

Table 17 – Household Information for Homeless Prevention Activities

#### 4b. Complete for Rapid Re-Housing Activities

Number of Persons in Households	Total
Adults	
Children	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

Table 18 – Household Information for Rapid Re-Housing Activities

#### 4c. Complete for Shelter

Number of Persons in Households	Total
Adults	
Children	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

Table 19 – Shelter Information

#### 4d. Street Outreach

Number of Persons in Households	Total
Adults	
Children	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

Table 20 – Household Information for Street Outreach

**4e. Totals for all Persons Served with ESG**

<b>Number of Persons in Households</b>	<b>Total</b>
Adults	
Children	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

**Table 21 – Household Information for Persons Served with ESG**

**5. Gender—Complete for All Activities**

	<b>Total</b>
Male	
Female	
Transgender	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

**Table 22 – Gender Information**

**6. Age—Complete for All Activities**

	<b>Total</b>
Under 18	
18-24	
25 and over	
Don't Know/Refused/Other	
Missing Information	
<b>Total</b>	

**Table 23 – Age Information**

**7. Special Populations Served—Complete for All Activities**

**Number of Persons in Households**

<b>Subpopulation</b>	<b>Total</b>	<b>Total Persons Served – Prevention</b>	<b>Total Persons Served – RRH</b>	<b>Total Persons Served in Emergency Shelters</b>
Veterans				
Victims of Domestic Violence				
Elderly				
HIV/AIDS				
Chronically Homeless				
<b>Persons with Disabilities:</b>				
Severely Mentally Ill				
Chronic Substance Abuse				
Other Disability				
Total (unduplicated if possible)				

**Table 24 – Special Population Served CR-70 – ESG 91.520(g) - Assistance Provided and Outcomes**

**8. Shelter Utilization**

Number of New Units – Rehabbed	0
Number of New Units – Conversion	0
Total Number of bed - nights available	654,810
Total Number of bed - nights provided	595,943
Capacity Utilization	91.01

**Table 25 – Shelter Capacity**

## 9. Project Outcomes developed in consultation with the CoC(s)

The role of the Continuum of Care is described in Section CR-25 above. CR-75 – Expenditures

## 10. Expenditures **These numbers are exclusive of ESG-CV expenditures**

### 10a. ESG Expenditures for Homelessness Prevention

	Dollar Amount of Expenditures in Program Year		
	2019	2020	2021
Expenditures for Rental Assistance	31,851	18,466	44,168
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	14,277	15,776	14,971
Expenditures for Housing Relocation & Stabilization Services - Services	569	3,173	74,540
Expenditures for Homeless Prevention under Emergency Shelter Grants Program	0	0	133,680
<b>Subtotal Homelessness Prevention</b>	<b>46,697</b>	<b>37,415</b>	<b>267,359</b>

Table 26 – ESG Expenditures for Homelessness Prevention

### 10b. ESG Expenditures for Rapid Re-Housing

	Dollar Amount of Expenditures in Program Year		
	2019	2020	2021
Expenditures for Rental Assistance	64,532	66,970	25,589
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	47,967	57,929	28,932
Expenditures for Housing Relocation & Stabilization Services - Services	23,394	749	1,280
Expenditures for Homeless Assistance under Emergency Shelter Grants Program	0	0	55,800
<b>Subtotal Rapid Re-Housing</b>	<b>135,893</b>	<b>125,648</b>	<b>111,601</b>

Table 27 – ESG Expenditures for Rapid Re-Housing

### 10c. ESG Expenditures for Emergency Shelter

	Dollar Amount of Expenditures in Program Year		
	2019	2020	2021
Essential Services	41,000	33,850	10,000
Operations	35,523	60,617	76,000
Renovation	0	0	0
Major Rehab	0	0	0
Conversion	0	0	0
<b>Subtotal</b>	<b>76,523</b>	<b>94,467</b>	<b>86,000</b>

Table 28 – ESG Expenditures for Emergency Shelter

**10d. Other Grant Expenditures**

	Dollar Amount of Expenditures in Program Year		
	2019	2020	2021
Street Outreach	36,208	129,173	70,000
Coordinated Intake	18,000	18,000	0
Other Miscellaneous	59,869	38,264	0
Administration	0	0	18,301
<b>Subtotal</b>	<b>114,077</b>	<b>185,437</b>	<b>88,301</b>

**Table 29 - Other Grant Expenditures**

**10e. Total ESG Grant Funds**

Total ESG Funds Expended	2019	2020	2021
	<b>373,190</b>	<b>442,967</b>	<b>356,275</b>

**Table 30 - Total ESG Funds Expended**

**10f. Match Source**

	2019	2020	2021
Other Non-ESG HUD Funds	0	0	0
Other Federal Funds	0	0	0
State Government	0	0	0
Local Government	27,619	105,000	0
Private Funds	31,417	27,417	382,200
Other	330,230	315,417	25,000
Fees	0	0	
Program Income	0	0	
<b>Total Match Amount</b>	<b>389,266</b>	<b>447,564</b>	<b>407,200</b>

**Table 31 - Other Funds Expended on Eligible ESG Activities**

**11g. Total**

Total Amount of Funds Expended on ESG Activities	2019	2020	2021
	<b>373,190</b>	<b>442,967</b>	<b>370,306</b>

**Table 32 - Total Amount of Funds Expended on ESG Activities**

**APPENDIX 1**

**CONTINUED NARRATIVE**

**SECTIONS**

## **APPENDIX 1- CONTINUED NARRATIVE**

### **CR-05- Goals and Outcomes (Continued)**

This report allows concerned citizens, elected officials, and HUD to evaluate the City's performance and assess its status in meeting the Second Action Year of the five-year goals established in the 2020-2024 Five-Year Consolidated Plan (which can also be accessed at the above web site address). The Five Year Consolidated Plan includes overall strategies, with a particular focus on low and moderate income individuals and families, to provide safe, decent and affordable housing; to end homelessness by moving individuals and families from homelessness to permanent housing; to provide a safe and suitable living environment with adequate public facilities and services to ensure a high quality of life; and, to expand economic opportunities by providing financial resources and technical assistance to businesses in creating jobs and providing retail and commercial services with particular focus in the Neighborhood Revitalization Strategy Area (NRSA).

The Citizens Committee for Community Development (CCCD) provided a favorable recommendation to City Council on the proposed goals and objectives for the use of federal grant funds in the Second Action Plan Year based upon public input and staff recommendations. Accepting the CCCD recommendations, the City Council of Oklahoma City approved Twenty-Nine (29) CDBG and HOME projects and activities (including planning and administration functions, and an open public facilities solicitation) totaling \$10,564,324 in the 2021-22 Second Action Plan Year. A total of \$470,639 was made available to ESG providers and \$1,578,893 to HOPWA activities. These amounts included new funding, carryover balances, and allocation of accumulated program income. The 2021-22 formula grant allocations for CDBG, HOME, ESG and HOPWA totaled \$8,878,016. In May 2020, awards of supplemental CDBG-CV funds in the amount of \$2,948,568; ESG-CV in the amount of \$1,475,283; and HOPWA-CV in the amount of \$130,112 were approved by HUD to address immediate needs related to the COVID-19 pandemic. The CV program expenditures began in FY 2020-21 and are linked with the FY 2019 CARES Act Amendment. Accomplishments and expenditures for this fiscal year are reported in this plan where applicable. CDBG-CV3 funds in the amount of \$4,151,551 and HOME ARP funds in the amount of \$8,443,107 were received in FY 2021-22. Related accomplishments will be reported in future program years.

Much of this report is supported by lists and numbers; however, community benefit is difficult to quantify as each investment serves as a catalyst for both individual and collective growth. Each of the reported program activities has a positive impact for a low-income family or individual, and/or for a low income neighborhood as an area benefit. For example, the following report notes that 54,343 taxi and bus fare coupons assisted someone who is elderly, disabled or homeless with transportation. These services assisted people in reaching a doctor, visiting a relative, attending church, shopping for groceries or fulfilling other personal needs that require transportation.

In other programs, 73 families were assisted with emergency repairs to their houses, and 32 families were assisted in buying a home. Funds were used to make neighborhoods safer by boarding up 171 neglected houses and building new homes on vacant lots. In some homes lead paint hazards were abated. Despite challenges, delays and interruptions due to COVID-19, The City of Oklahoma City ('The City') continued to achieve progress, as this year's programs helped to meet the priorities outlined in our five-year Consolidated Plan.



<b>Grant</b>	<b>Total Expenditures</b>	<b>Total Served</b>
CDBG	\$6,990,605.02	70,376
CDBG-CV	\$2,347,296.74	1,273
CDBG-CV3	\$2,072,013.00	0
HOME	\$1,286,791.44	23
HOME ARP	\$0	0
ESG	\$370,306.66	5,586
ESG-CV	\$2,906,056.35	8,135
HOPWA	\$893,126.29	558
HOPWA-CV	\$40,697.72	54
<b>TOTALS</b>	<b>\$16,906,893.22</b>	<b>86,005</b>

The City expended a total of \$9,540,829.41 in CDBG, HOME, HOPWA and ESG funds during the program year. Additionally \$2,347,296.74 in CDBG-CV; \$40,697.72 in HOPWA-CV; and \$2,906,056.35 in ESG-CV funds were expended on pandemic related community needs. Complete expenditure and accomplishment data for the 2021-22 Second Action Plan Year can be found in Appendix 2. During this second year of the Five-Year Consolidated Plan, The City expended a total of \$16,906,893.22 (including supplemental CV allocations) serving a total of 86,005 persons and households.

The City was moderately successful in attaining the goals and objectives contained in the 2021-22 Consolidated Plan and Second Action Year Strategy. The activities undertaken address the overall program goals of the formula grant programs including the provision of decent housing, a suitable living environment, and expanding economic opportunities principally for persons of low and moderate income.

The City's 2020-24 Consolidated Plan and 2021-22 Second Action Year Plan called for achieving housing goals by providing funding and engaging in program activities that include support for nonprofit and for-profit housing developers to rehabilitate and construct new affordable housing; support for Community Housing Development Organizations (CHDO's) to rehabilitate and construct new affordable housing; funding for the Oklahoma City Urban Renewal Authority (OCURA) to construct new homes for affordable housing on vacant infill lots; support for the Oklahoma City Housing Authority (OCHA) to modernize public housing units; funding to assist with emergency repairs of housing for low-moderate income households; support for down payment and closing cost assistance to expand homeownership opportunities for low-moderate income households; and, funding for activities that support housing and services for persons with HIV/AIDS.

The goal of providing a suitable living environment was addressed in the Consolidated Plan and First Action Year Strategy by continuing ongoing programs that address specific community needs. The 2021-22 Second Action Year Plan called for the continued support for homeless services through the Emergency Solutions Grant (ESG) Program; the Continuum of Care Program (CoC); discounted taxi coupons and bus fares for elderly, disabled and sight impaired persons under the City's Share-A-Fare program; local funding of capacity building activities for neighborhood organizations and CDBG funding to provide neighborhood improvements; activities to address vacant and abandoned housing; and, removal of slum and blight conditions in low-income areas as well as other public investments.

In addition, The City of Oklahoma City made progress in attaining its goals for expanding economic opportunities. The City's Consolidated Plan and Second Action Year Strategy called for engaging in program activities that provide technical assistance to small businesses in obtaining financing and investing Section 108 Loan Guarantee funds in businesses to create jobs for low- and moderate-income persons.

The tables in Appendix 2 detail expenditures and achievements based on the City's financial records regarding formula grant activities for each goal and objective contained in the Consolidated Plan. The tables specifically address expenditures and accomplishments recognized in the 2021-22 program year. The HUD IDIS reports attached in Appendix 3 provide further detail related to the accomplishment information provided. The SNI program, which has historically been somewhat slow in expending capital funds, made noticeable progress in recent years with the completion of multi-year neighborhood public facility and sidewalk installation activities. SNI activities supported with CDBG funds during the reporting period include tree plantings, hazardous tree removals, summer and afterschool programming for local elementary schools, and neighborhood grants to support activities such as the installation of sign toppers, benches, and public art projects. The most recently designated SNI neighborhoods are moving beyond initial planning phases to implementation of projects; and expenditures in the Capitol Hill, Capitol View and Metro Park neighborhoods are expected to increase substantially in the Third Action Plan Year as large public facilities projects move from construction to completion.

Under the City's Community Development Public Facilities Program there remains a balance of \$630,371 that is uncommitted. Unallocated funds are available for new proposals under this program. Significant funding from this line item was reallocated via Substantial Amendments during the reporting period to assist with rapidly rising housing construction costs in the City's housing rehabilitation programs. Public arts projects for a MAPS3 Wellness Center and Pitts Park received funding in the First Action Plan Year but have not yet been completed. \$478,535 was allocated during the reporting period for the construction of a public sewer connection to support affordable housing development on Urban Renewal lots. The project is in design and expected to be completed in the Third Action Plan year.

The City also supported various public services activities with CDBG funds in the Second Action Plan year. Healing Hands, a healthcare organization serving persons who are homeless, was allocated \$60,000 for public service activities, all of which was expended in the Second Action Plan year. Funding in the amount of \$84,250 was allocated for legal services to aid persons facing evictions; all of which was expended during the reporting period. A small carry forward balance of \$8,483 was provided to CASA for advocacy services for children in the state's foster care system. \$105,000 was allocated to the Central Oklahoma Transportation and Parking Authority to provide discounted bus and taxi fares, and to provide courier services for special populations to dentists appointments. These funds were fully expended during the Second Action Year plan.

With respect to complementary projects that were not funded through grants, the City's MAPS and bond projects are notable. An affirmative vote by the taxpayers in September 2017 extended the MAPS 3 capital improvements initiative through March 2022. This temporary sales tax will generate an additional \$240 million for streetscapes, \$24 million for sidewalks, \$12 million for the trails system, and \$12 million for bicycle infrastructure. Many of these activities were completed during the reporting period or are now underway. A bond vote also passed in September 2017 which for the first time allocates a portion of funding for the development of affordable housing; about \$10 million in revenue was made available and is being used to support affordable units in new projects. A MAPS 4 sales tax initiative to support additional capital improvement projects and social service activities was approved by a public vote in

December 2019 to raise a projected \$978M. For the first time, a focus is on investing in social service and human need projects such as a new civil rights center, senior wellness centers, youth center, housing for the homeless, and the Family Justice center which provides services to persons who have experienced domestic violence, mental health crisis centers. Implementation and construction of the approved projects will begin upon collection of the applicable sales tax. Future year reports will address specific activities in more detail.

**CR-15 (Leveraging), (Continued):**

The City also provided \$121,000 in local funding (general funds) last year to agencies that provide services to the homeless. The table below highlights the agencies funded, the grant amounts, expenditures, and balances.

<b>CITY SOCIAL SERVICES GRANTS</b>			
	<b>FUNDING</b>	<b>EXPENDITURES</b>	<b>BALANCE</b>
Catholic Charities	\$10,000.00	\$10,000.00	\$0.00
City Care	\$12,000.00	\$12,000.00	\$0.00
Community Health Centers, Inc.	\$5,750.00	\$5,750.00	\$0.00
Good Shepherd Ministries	\$2,500.00	\$2,500.00	\$0.00
Heartline, Inc.	\$22,400.00	\$22,400.00	\$0.00
Legal Aid Services of Oklahoma, Inc.	\$5,000.00	\$5,000.00	\$0.00
NSO	\$4,500.00	\$4,500.00	\$0.00
Pivot	\$13,200.00	\$13,200.00	\$0.00
Positive Tomorrows	\$15,000.00	\$15,000.00	\$0.00
SISU Youth	\$11,650.00	\$10,500.00	\$1,150.00
Upward Transitions	\$12,000.00	\$12,000.00	\$0.00
Urban league of Greater OKC, Inc.	\$5,000.00	\$5,000.00	\$0.00
YWCA of Oklahoma City	\$2,000.00	\$2,000.00	\$0.00
<b>Total</b>	<b>\$121,000.00</b>	<b>\$119,850.00</b>	<b>\$1,150.00</b>

**LEVERAGE**

Federal funds provided by HUD are utilized in several ways to leverage public and private resources. The City’s down payment and closing cost assistance program assists in the achievement of home ownership and has proven to be an attractive program that stimulates interest among private lenders. During the reporting period, the City leveraged its Down Payment Assistance program funds with *private* financial institution mortgage investments totaling \$1,838,446. For every dollar of downpayment assistance provided through the HOME program, the City leveraged \$7.87.

**HOME MATCH**

Presidential Disaster Declarations and HUD match reduction for severe fiscal distress has eliminated the need to provide 25% match funding for the HOME program in recent program years. During the 2021-22 program year, a Presidential Disaster Declaration eliminated the match requirement due to severe fiscal distress precipitated by the COVID-19 pandemic.

For more information, please reference the attached HOME match report (Form HUD-40107-A) which is reflective of the correct match credit as reported (Appendix 6).

### **ESG Match**

The ESG requirement for match contributions equal to the grant program funds was fulfilled with new funding and other resources 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.

The sources of matching resources well exceeded the amount of the grant funds and included:

Local Government	\$0.00
Private Funds	\$382,200.39
Other Sources	\$25,000.00
	<b>\$407,200.39</b>

### **CR-20 Affordable Housing (Continued)**

The City previously committed HOME funds in support of Low Income Housing Tax Credit (LIHTC) applications to the Oklahoma Housing Finance Agency (OHFA); however, in 2016 OHFA discontinued awarding bonus points for applications that receive a minimum level of funding from the local community. When funding is available, the City does periodically accept requests and/or competitive applications for project specific CDBG and HOME awards to fill financing gaps. During the Second Action Year of the 2020-2024 Consolidated Plan, the City approved \$550,000 in HOME funds to assist with a funding gap for an affordable housing tax credit project (Harmony School Apartments) that will provide forty (40) affordable housing units.

HOME funds were allocated to Community Housing Development Organizations (CHDOs) that resulted in the construction and sale of three (3) affordable housing units with an additional eight (8) units underway. None of the completed and sold units were funded entirely with CHDO proceeds during the program year.

The HOME Affordable Housing Development Program (AHDP) supported a forty (40) unit multifamily housing project for the Harmony School Apartments during the FY 2020-21 Action Plan Year. The OCHA Creston Park Care Suites funded in the First Action Year plan remains in the design phase, but is expected to provide ninety (90) assisted living units when completed.

The Oklahoma City Housing Assistance program completed six (6) whole house rehabilitations with HOME funding during the 2021-22 program year. In addition, one (1) whole house rehabilitation is underway.

The Down Payment and Closing Cost Assistance Program completed fifteen (15) transactions. Of the total households assisted, two (2) were located in the NRSA target area and thirteen (13) were located in other low and moderate-income census tracts or block groups.

Based on outcome numbers provided in the IDIS Summary Accomplishment Report PR23 regarding the CDBG Program, Thirty-seven (37), or 46.8 % of households that were provided Owner Occupied Assistance possessed extremely low incomes (at or below 30% of median); Twenty-six (26) or 32.9% possessed low

incomes (31% to 50% of median); and Sixteen (16) or 20.3 % possessed moderate incomes (51% to 80% of median). No households with incomes over 80% of median income were assisted. Four (4) rental units for low-moderate income families were completed during the reporting period.

Based on outcomes provided in the IDIS Summary Accomplishment Report PR23 regarding the HOME Program Beneficiaries; Twenty (20) households were assisted during the program year. For HOME Program First-time Homebuyers (11 households), none were extremely low income families (0-30%), none were very low income (31-50%), none possessed low incomes (51-60%), and Eleven (11) or 55.0% were in the low moderate income range (61-80%). For Existing Homeowner Beneficiaries (9 households), none were extremely low income, Seven (7) possessed very low incomes, Two (2) were low income (51-60%), and none possessed low moderate income.

### **CR-25 Addressing Emergency Shelter, (Continued):**

The Continuum of Care Board (CCB) represents a broad spectrum of the community including formerly homeless persons, the business community, service providers, community volunteers and the faith-based community. All members have a commitment to ending homelessness (including chronic homelessness) and are advocates in the community. Members of the Continuum of Care (CoC) also participate in the gathering of data for gaps analysis, and provide input into the prioritization of needs. CoC agencies and organizations have historically worked collaboratively with other groups to successfully complete the Point-In-Time survey. The work of the CCB is not isolated to reviewing and writing each year's Continuum of Care application. The Oklahoma City CCB members actively participate year-round in a number of important committees/planning bodies whose work is important to the implementation and development of the Continuum of Care. The CCB also determines the annual rating measures for Continuum of Care, Social Services, HOPWA and ESG grantees.

The WestTown Resource Center and homeless Day Shelter are owned and operated by The Homeless Alliance and have had a significant impact on the community's efforts to reduce homelessness. Both facilities were identified as a critical need in the 10 Year Plan and are serving several hundred people daily, including a number of neighborhood (non-homeless) residents seeking access to benefits and meals. 2-1-1 has served as the centralized intake contact for ESG, Continuum of Care and other homeless housing programs. It is currently the community resource for initial evaluation of social service needs including emergency situations. The 2-1-1 system, however, has been severely threatened by State of Oklahoma budget cuts in recent years.

### **CR-25, Helping homeless persons transition to permanent housing (Continued):**

The Oklahoma City Continuum of Care (CoC) utilizes a coordinated entry and assessment system for all clients served by the homeless services system. When a person who is homeless contacts a homeless services provider or accesses the 2-1-1 system, an assessment is conducted which includes identifying health concerns, length of time on the street, and other relevant information to determine where they will be placed on the CoC's priority list for housing. A Coordinated Case Management team meets weekly to review cases on the list and determine who will provide adequate housing and services based on a client's needs. Once determined, a case manager is assigned, the client is located and moved into the first available unit and supportive services are provided. The Oklahoma City Continuum of Care has placed

over 1,000 chronically homeless individuals and veterans into housing in the last 5 years and maintains a retention rate between 80-90%.

### **CR-35 Other Actions- Ameliorating Negative Effects of Public Policies (Continued):**

The City also provided CDBG funds for Economic & Planning Systems, Inc. to perform a Comprehensive Housing Affordability Study for Oklahoma City, to identify recommendations to increase the quality and quantity of affordable housing in our community. That study and the accompanying recommendations was completed in Fall 2021. This study included suggestions for code revisions in support of affordable housing. The City is currently engaged in a comprehensive code review, and rewrite and the suggestions will be considerations for potential revisions.

### **CR-35, Other Actions-Actions taken to reduce the number of poverty level families (Continued):**

With regard to public education and other locally funded programs that address poverty in Oklahoma City, the City utilized CDBG SNI funds to fund afterschool and summer programming at the Capitol Hill Middle School and Lee Elementary School in the Capitol Hill Neighborhood, and the Martin Luther King, Jr. Elementary School, Moon Middle School, and Thelma Parks Elementary School in the Capitol View and Culbertson's East Highland Neighborhoods, The summer school programs adapted the nationwide Science Technology Engineering and Math (STEM) program into STEAM by incorporating a new component focus on Art education.

Public education and job creation activities coupled with construction of affordable and market rate housing, provides opportunity for individuals and families to move from poverty to higher levels of security and prosperity. In addition, new housing development is providing employment opportunities at good wages to low/mod income persons and minorities in various construction trades.

Finally, the City is addressing homelessness through continued support of the WestTown Housing Resource Center and Homeless Day Shelter Campus which opened in August 2011. This combined public facility provides a one-stop location for homeless persons and those at risk of becoming homeless to obtain needed assistance. The City supports the center through an annual Agreement to fund operational expenses from the City's General Fund. The 2021-22 program year commitment totaled \$300,000.

### **CR-35, Other Actions-Impediments (continued):**

Several activities supported during the reporting period speak directly to improving, understanding and enhancing compliance with fair housing law. These important activities will continue in the upcoming year.

The City is fully committed to affirmatively furthering fair housing. Efforts to promote equitable housing opportunity during the Second Action Plan Year included the following activities:

- Provided landlord-tenant education to SNI neighborhoods
- Shared information about Fair Housing and Discrimination on the SNI Facebook page.

- Hosted an SNI Housing and Legal Workshop for Renters in Fall 2021 highlighting available services and programs, Fair Housing law, Predatory lending practices, legal aid, and resources for resolution of disputes.
- Evaluating the *Housing Affordability Study* completed by EPS, Inc. to identify demands, trends and habitability issues in our community to be considered in future funding decisions.

Other identified impediments are being addressed by other parts of the City, outside this Action Plan. One of these is zoning, and as a related cause, citizen opposition to multi-family development. The City engaged a consulting firm to diagnose problems with the existing zoning code and review it for conformance with the City's comprehensive plan. Public meetings have been conducted throughout the year to obtain citizen input. The four (4) year process of overhauling the code began in late 2018 and is nearing completion. This process will also examine recommendations for code changes that were identified in the City's, Housing Affordability Study intended to support development of affordable housing.

The City passed a municipal bond issue in September 2017 which will add more sidewalks, transit stops, increase ADA compliance at existing stops, and perform bus system upgrades to advance the public transit system- with a focus on improvements where it is most needed by the citizenry base on review of area incomes and employment centers. Many of these improvements have been completed or are now under construction.

The General Obligation Limited Tax Bonds (GOLT Bonds) approved in 2017 included a \$10M set aside for affordable housing- the first time the City made such a proposal or investments. A policy establishing eligibility criteria, programmatic guidelines, and performance requirements for these funds was approved by City Council in June 2018. City staff with staff of the Alliance for Economic Development, the Oklahoma City Economic Development Trust (OCEDT) and City Council are engaged in funding decisions. The adopted policy prioritizes mixed-income developments in areas accessible to employment, transit, quality schools and grocery stores for persons earning less than 80% AMI. To date, 4 awards have been made supporting development of 546 rental units for households earning less than 80% AMI. An additional 3 projects supporting another 484 units are under evaluation. If funded, these projects will exhaust the remainder of the GOLT housing dollars.

### **CR-40 Monitoring, Public input on performance (Continued):**

During the citizen participation year-end review process, Staff presented the 2021-2022 Consolidated Annual Performance Evaluation Report (CAPER) to the Citizens Committee for Community Development at their regular meeting on September 20, 2022 at 3:30 p.m. The meeting was open to the public and a legal notice was published in *The Oklahoman* on September 4, 2022.

#### Public comments:

There was only one comment received from either the public or the Citizen's Committee. A citizen stated that Community Action Agency needs an additional \$200,000 for emergency repairs because the current \$600,000 allocated for this program is not enough. The processing of the Home

Emergency Repair application is very long for what is considered an “emergency” repair. The speaker noted that the inability of the service provider to address an emergency issue without identifying and repairing other issues in the home is problematic. The speaker noted that he will appear at the next Action Plan meeting to advocate for this additional funding.

### **CR-45, CDBG (Continued):**

A Substantial Amendment to the 2020-21 Annual Action Plan was approved by City Council on January 4, 2022. The amendment authorized an additional \$4,151,551 in CDBG-CV3 funding. It approved a new project from these funds (Taylor Ridge Apartments) at 4759 NW 36<sup>th</sup> Street in the amount of \$4.8 million from the CV3 and regular formula grant funds for acquisition and rehab of a multifamily housing project to benefit formerly homeless and low income persons. The Amendment also authorized the City to receive \$8,443,107 in federal HOME ARP funds; however, at HUD’s request the Amendment was resubmitted and approved at \$422,155 which represents 5% of the award. These funds are available to support Administration expenses until an Allocation Plan is received and approved by HUD. The remaining funds will be made available for eligible activities following approval of the Allocation Plan. In addition, a new Emergency Pest Inspection and Treatment Program in the amount of \$24,000 was established with CDBG funds to support whole house rehabs assisted under the HOME program.

A Minor Amendment in early March 2022 reallocated \$20,000 from the CDBG Public Facilities line item to the Abandoned Housing program to meet a funding shortage created by the rising costs of construction materials.

A second Substantial Amendment to the 2020-21 Annual Action Plan was approved by Council on March 15, 2022. This Amendment authorized a \$600,000 reallocation from the CDBG Public Facilities line item to the Section 108 Loan Program contingency line item, and prepayment of principal in the amount of \$947,000 to HUD to reduce liabilities on outstanding debt. This Amendment also authorized a \$100,000 allocation from the CDBG Public Facilities line item to the OKC Abandoned Housing line item to offset rising construction costs.

A Minor Amendment in April 2022 reallocated \$60,000 from the CDBG Public Facilities line item to the CDBG Emergency Home Repairs Program to offset rising construction costs. In addition, \$5,000 was reallocated from general administration to planning within the Administration project activity.

Beneficiary data reported for the FY 2021-22 Second Action Year plan includes expenditures and accomplishments from these funding sources, in addition to the formula grant funds allocated for the program year. Although linked to the FY 2019-20 Fifth Year Action Plan, accomplishment and expenditures for CV activities will continue to be reported annually in the CAPER until all CV funds are fully expended.

The City of Oklahoma City monitored the expenditure of CDBG funds throughout the year to ensure that funded activities (for the reporting period and prior years), were completed as agreed and that funds were expended timely. In instances where funds were not fully expended, the carryover balance was re-allocated to the subrecipients for expenditure in the FY 2022-23 Third Action Plan Year, or recaptured and reprogrammed as determined necessary by Staff in response to pending commitments and anticipated program demand.

The Tables in Appendix 2 detail expenditures and achievements based on the City’s financial records relative to formula grant activities for each goal and objective contained in the Consolidated Plan. The



tables specifically address expenditures and accomplishments regarding the 2021-22 program year. The attached HUD IDIS reports in Appendix 3 provide further detail related to the accomplishment information provided below.

The progress the City has achieved in meeting program goals for the 2021-22 Second Action Year plan is enumerated below.

- 1,642 households benefited from the construction of sidewalks in SNI neighborhoods with CDBG Funds.
- Twenty (20) hazardous trees in SNI areas were removed with CDBG funds and Seventeen (17) trees were planted in two (2) SNI neighborhoods with the help of private partners.
- Continued to coordinate with the OKC Public School System, OK Afterschool Network, Urban League, Boys & Girls Club, and the OKC Parks Department to offer STEAM, an afterschool and summer program at Three (3) elementary schools and Two (2) middle schools in SNI neighborhoods. 250 students participated.
- Interim Assistance was provided at 143 locations to secure abandoned properties that were an immediate threat to health and safety.
- Share-a-fare program provided 63,340 free or discounted transportation vouchers. Benefits were provided to 5,129 elderly; 8,737 persons with disabilities; 43,378 homeless bus fares; 294 homeless taxi fares, and 19,668 low-income day passes (**Note: some beneficiaries met criteria for more than one of these categories**).
- The Oklahoma City Housing Assistance Program completed thirty-three (33) Housing Exterior Maintenance projects.
- The Community Action Agency Emergency Home Repair program assisted forty-eight (48) households with Emergency Home Repairs.
- The Oklahoma City Housing Authority is utilizing CDBG funding allocated for modernization of public housing units for extremely low-income families. CDBG funds were used to rehabilitate thirteen (13) public housing units during the program year.
- Economic development technical assistance was provided to 139 businesses and prospective businesses through small business counseling and completion of an 8-week small business development/ownership training class. 16 businesses were assisted with loans. Community Action Agency also provided access to capital through the Enterprise Community Small Business Loan Program and Section 108 Small Business Loan Program to assist businesses in the NRSA and low mod areas.
- No Section 108 loans were approved during the program year; however, one (1) new Section 108 project was completed for renovation and adaptive reuse of the historic First National Building into a hotel, condominiums and retail operations was received and underwritten. 64 FTE's have been created to date. A prior project (21C Museum and Hotel) created an additional 25 FTE's during the reporting period.
- Neighborhood capacity building assistance, funded with local revenue, assisted three (3) neighborhood associations under the Strong Neighborhoods Initiative Program and aided with organizing numerous neighborhood organizations and events.

- \$947,000 in CDBG funds was used to prepay principal on Section 108 debt during the program year. A small balance of \$1,479 remains in contingency.
- Oklahoma City Urban Renewal Authority (OCURA) continues to implement the Urban Renewal Plans in three close-out areas that include R-20, R-30, and R-35. In addition, OCURA addresses slum and blight conditions with CDBG in locally designated project areas that include, Harrison Walnut, North Downtown, Cultural District, and NE Renaissance Area.
- The City annually contracts with the Metropolitan Fair Housing Council to monitor and investigate housing discrimination complaints. During the 2021-22 reporting period, the Metropolitan Fair Housing Council received 385 landlord/tenant intakes that resulted in the filing of nineteen (19) housing discrimination complaints. Metropolitan Fair Housing also processed thirty-one (31) requests for reasonable accommodation or modification. In addition, Metro Fair Housing Council conducted thirty-two (32) educational seminars and trainings for first-time homebuyers, public and private housing providers and faith-based housing providers.
- Ninety (90) Persons with evictions pending were provided legal assistance through Legal Aid Services; most resulted in negotiated settlements.
- Five Hundred (500) homeless persons received preventive healthcare services through the Community Health Centers Inc. CDBG grant.

### **CR-55 HOPWA (Continued):**

#### Project Sponsor:

The Homeless Alliance  
1724 NW 4<sup>th</sup> Street  
Oklahoma City, OK 73106

#### Subrecipients:

- **The AIDS Support Program (ASP)** was founded in 1986 and provides supportive and transitional housing for individuals and families living with HIV/AIDS and who encounter barriers to permanent supportive housing.

HOPWA Housing Case Manager – P.O. Box 12187, Oklahoma City, OK 73157 (405) 306-1366

- **Housing Location Services** conducted housing services for thirty (30) clients in FY 2021-22. These services included speaking with HOPWA clients about housing needs; conducting property searches; advocating for clients during the application process for housing; providing advocacy for abatements in rental rates, deposits and application fees; procuring housing for persons with unpaid utility bills; resolution of potential evictions and legal advocacy; assistance in resolving issues with property maintenance; and conducting habitability inspections. Continued success in housing clients is achieved through the development of relationships with property managers and owners.

The Homeless Alliance and its subrecipients are members of the Oklahoma City homeless Continuum of Care (CoC). The collaboration of HIV and Non-HIV service providers has created a holistic module of care. The OKC HOPWA Program does not have a waiting list.

### **The HOPWA Case Management Service is the foundation of the HOPWA Program:**

All income-qualified individuals are eligible to receive Housing Case Management services. The HOPWA case managers assist the client in understanding available housing resources and develop and monitor their comprehensive housing plan with connections to other support services. The plan identifies the household's ongoing housing stability needs and likely options for providing related assistance; including the use of other housing programs and mainstream health and human services welfare programs. The plan includes, but is not limited to development of a budget, referrals for social services or medical case management, legal assistance, employment services, and food. Funds can be used for emergency and temporary rent assistance, and mortgage and utility payments to transition eligible persons into more permanent housing arrangements.

### **Housing Information, Referral, and Inspection Services:**

This service provides information regarding available and affordable housing that meets the needs of people living with HIV/AIDS. By identifying vacancies, initiating application procedures and providing contact information for housing providers, the services provided aid in the prevention of homelessness and help return unsheltered persons living with HIV/AIDS to suitable housing. Staff proactively develops relationships with landlords and property management companies willing to rent permanent housing, and who are willing to accept rental assistance certificates. Many clients benefit from relocating to a lower rent and/or all bills paid housing. Housing inspections ensure all units meet HUD's habitability standards. The service provider has developed relationships with landlords to assist in housing hard to place clients. The provider is able to advocate for the tenant with the landlord as needed once a client has been placed in a unit.

**Emergency Housing:** to provide temporary shelter at a local long stay hotel with full kitchens (maximum of sixty (60) days).

**Permanent Housing Placement:** Expenditures that help establish a household in a housing unit, including (but not limited to) application fees, related credit checks, and reasonable security deposits necessary to move persons into permanent housing, provided such deposits do not exceed two (2) months of rent and are designated to be returned to the program. (One lifetime assistance).

**Short -Term Rent/Mortgage and Utility:** (STRMU) payments to enable eligible individuals to remain in their own dwelling. HOPWA funds are provided to prevent homelessness and assist those clients who have an HIV-related need. Each request for assistance is reviewed monthly to determine eligibility based on financial and HIV related need. (Based on client need up to a maximum of 21 weeks in a 52-week period).

**Tenant Based Rental Assistance:** (TBRA) assist income-eligible individuals or families with an HIV-related need with their rent until they are able to secure Section 8 vouchers or other affordable stable housing. Most TBRA clients will be certified for three (3) months and reviewed for progress in meeting goals of the client securing stable and permanent housing independent of continued HOPWA assistance.

**Employment Services:** Employment is an essential focus within the coordinated response to HIV/AIDS. Employment is a key component of serving the whole person. It can be critical to improving the economic

and personal well-being of people living with, and most at risk of HIV/AIDS. Studies have shown that employment can positively impact health and increase a person's ability to live a satisfying, productive and meaningful life. Employment can also increase financial self-sufficiency and reduce reliance on publicly funded benefits and other services.

**The OKC HOPWA services area includes seven counties:** Oklahoma, Cleveland, Canadian, Grady, Lincoln, Logan, and McClain Counties.

**City of Oklahoma City Staff Contact:**

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**HOPWA Program Contact:**

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Associate Executive Director  
The Homeless Alliance, Inc.  
(405) 415-8410  
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**Annual Performance:**

The City of Oklahoma City is the grantee for HOPWA entitlement funds. The funds must be used within the Oklahoma City Eligible Metropolitan Statistical Area (EMSA) which includes a seven-county area of central Oklahoma (Canadian, Cleveland, Grady, Logan, Lincoln, McClain, and Oklahoma counties). The HOPWA program is an integral part of our HIV/AIDS system of care services. The HOPWA program allocates funds to meet the housing needs of persons with HIV/AIDS, including lease/rental assistance, shared housing arrangements, apartments, and community residences. Supportive services including case management are also included in the program. During FY 2021-22 a total of 558 persons were served with HOPWA funds:

The greatest resource of the HOPWA program is the HOPWA Case Manager. 100% of all HOPWA clients are seen by a HOPWA Case Manager. HOPWA Case Managers use Service Point, a case management and outcome tool. This web-based tool allows us to better assess clients and measure outcome. A full housing assessment is completed to determine each client's housing needs. The case manager helps clients understand available housing resources and develop and follow their comprehensive housing plan, as well as provide connections to other supports. The plan identifies the household's ongoing housing stability needs and likely options for providing related assistance, including the use of other housing programs and mainstream health and human welfare programs. The plan includes (but is not limited to) development of a budget, referrals for social services or medical case management, legal, employment and food.

- 100% of the HOPWA clients were referred for other support services.
- 100% of the HOPWA clients who received assistance improved access to medical care.

HOPWA funds can also be used for emergency housing, temporary rent, mortgage and utility payments

to transition eligible persons into more permanent housing arrangements. A total of 339 clients were assisted with housing, case management, and other supportive services. Other assistance provided with HOPWA funds in FY 2021-22 include:

- 30 Emergency Housing Assistance (Note: An additional 20 households received Emergency Housing Assistance through HOPWA-CV funding).
- 55 Permanent Housing Placements
- 89 Short Term Rent Mortgage and Utility Assistance payments (Note: An additional 34 households received STRMU thru HOPWA-CV funding).
- 45 Tenant-Base Rental Assistance payments

*Please note that there were 558 total beneficiaries served with HOPWA funds. Some households noted above received more than one service.*

Coordination and leverage of services is the key to success for many of our HOPWA clients.

Some examples of leveraged services in our system of care include:

- Street homeless outreach services have improved with a team of HIV and Homeless services providers working collaboratively to identify newly infected persons and guiding those living on the street to housing and care services.
- The Homeless Alliance provides funding for the AIDS Legal Resources Project. This program works closely with the HOPWA program to assist with legal issues that directly affect the client's ability to obtain and maintain housing.
- For clients who are identified as "out of care", the HOPWA case manager makes an appointment for necessary treatment and an appointment to the Ryan White Outreach case manager.
- The Homeless Alliance contracts with a local provider, Urban Housing Locator, to connect public and private housing providers, and to develop a resources list, perform inspections, and build relationships with landlords. This has proven beneficial in placing clients in more affordable units and encouraging landlords to accept harder to place clients who have felonies or past evictions.
- The Homeless Alliance uses volunteers to provide support services to HIV clients. This program includes volunteers helping HOPWA clients move into housing, taking clients to appointments, and other day-to-day activities.
- The Homeless Alliance provides some support to the Winds House, a transitional housing program for fifteen (15) clients.

Using the services of Urban Housing Locator, a pool of FMV housing (all-bills-paid) apartments has been located which provides individuals a broader choice of affordable locations. Locating units that will accept felons has allowed HOPWA Case Managers the ability to house hard to place clients. The HOPWA project made great progress in moving individuals from TBRA into affordable independent housing. Housing inspections ensure all units meet HUD's habitability standards.

## **Barriers and Trends:**

### **a. Barriers to Housing**

1. The need for more affordable housing is a persistent barrier.

2. Clients receiving Section 8 vouchers face landlords' reluctance to accept/participate in the Section 8 program.
  3. Vacancy rates are trending lower, and rents are increasing; thus, reducing the affordable rental housing stock. There remains strong demand for rental housing in the present economy. Historically low interest rates are making homeownership more attractive for lower income families. .
  4. Oklahoma City has very few SRO units or small "all bills paid" units, and persons with HIV/AIDS are forced to compete with other individuals with disabilities and senior citizens for stable affordable housing.
  5. Clients often have poor credit and rental history, felony convictions, mental health and/or substance abuse issues. These issues make them undesirable to prospective landlords.
- b. Trends include:
1. Those who are able and ready to join the workforce face an array of employment issues. Many have outdated skills or a past work history in under-employed jobs. History of substance abuse, criminal history, lack of transportation and day care expense add to the list of challenges in obtaining and maintaining employment.
  2. The most significant issue is the risk of losing access to HIV health care and medication. For many, the income earned when re-entering the workforce is seldom enough to offset the cost of benefits.
  3. Oklahoma City has a large Latino community. Serving this population is a challenge as many of these families are ineligible for other governmental assistance.
  4. Mental health problems and/or substance abuse are predominant among the target population.

**Accomplishments:**

Complete accomplishment and expenditure data for the HOPWA program is provided in Appendix 2.

**Short-term rental mortgage utility (STRMU) assistance** is determined by fair market value in the county in which the consumer resides. Often, consumers become ill and unable to meet housing expenses. The STRMU program provides assistance for the consumer and their family to prevent homelessness. A complete assessment of the consumer's needs identifies areas that require assistance. Rent, mortgage payments and utility assistance can be provided. The costs associated with STRMU this reporting period are \$153,018.

**Tenant based rental assistance (TBRA)** is another form of assistance available to consumers that are housed. This process begins with a housing quality inspection to ensure consumer safety. Total household income is verified in order to establish the amount of TBRA assistance provided. HUD provides guidelines for fair market utility and rent. 30% of the total household income is the amount for which the consumer is responsible with HOPWA providing 70%. Rental assistance can be provided for a limited period of time to families following the death of a consumer. Cost for TBRA this reporting period is \$172,633.

No new units of housing have been created through acquisition, rehabilitation, or new construction since 1993 with HOPWA funds. Unique supportive services and efforts include project planning in coordination with the Oklahoma City Housing Authority to provide consumers of The Homeless Alliance the opportunity to obtain Section 8 vouchers attached to new housing units built specifically to house this population.

Additionally, project planning in coordination with Community Action Agency (CAA) has begun in order to provide consumers the opportunity for home ownership.

In addition to the projects mentioned above, The Homeless Alliance maintains a comprehensive Program Manual to ensure that all regulations for reporting are met.

The future provision of services to persons with HIV/AIDS will require a continued commitment to building and maintaining collaborative relationships, investigating non-traditional funding sources, and streamlining expenses.

### **CR-65 ESG Person Assisted (See ESG CAPER Report attached as Appendix 5)**

Explanation re: why data cannot be corrected, and proposed plan to resolve related errors (as requested by HUD in prior years):

There are no narrative fields available to us in the CR-65 screen, as the ESG SAGE reports have replaced these data entry requirements. In response to HUD's prior request for additional information about errors in values, please note the following. All ESG CAPER data originates from a report generated through our Homeless Management Information System database (HMIS). It produces a zip file which contains approximately thirty (30) individual spreadsheets, one for each question. This report must be created for all projects and then unzipped and reloaded into the SAGE HMIS Reporting Repository System to produce the completed ESG CAPER.

The Legal Aid and YWCA projects serve victims of domestic violence exclusively and are not required to enter data into HMIS for safety reasons. It is the CoC's, and the OK Attorney General's preference that the partnering agencies restrain from performing this function. Data is maintained in a similar system as required; however, it is not feasible to produce a report that can be uploaded into SAGE. The data likely contains other minor discrepancies as well. In order to assimilate the required data, SAGE generated exception templates are directed to the service providers for manual completion.

### **CR-75 Expenditures**

The data in the CR-75 Tables reflects ESG entitlement funded activities only. Per guidance received from the Oklahoma City HUD Field Office, the ESG-CV quarterly SAGE Reports will be used by their accounting staff to review ESG-CV funded activities.

**APPENDIX 2**

**FINAL EXPENDITURES AND  
ACCOMPLISHMENT REPORTS**



2021-22 FORMULA & COMPETITIVE GRANT SUMMARY OF EXPENDITURES AND ACCOMPLISHMENTS

COMMUNITY DEVELOPMENT BLOCK GRANT							
	FUNDING	EXPENDITURES	BALANCE	OUTCOMES	UNIT OF MEASURE	OTHER	UNDERWAY
<b>PROGRAM ACTIVITIES</b>							
<b>Affordable Housing Development and Rehabilitation</b>							
Housing Exterior Maint and Program Delivery	\$ 1,300,000.00	\$ 1,056,012.82	\$ 243,987.18	33	Households		0
CAA Emergency Home Repair	\$ 660,000.00	\$ 577,293.55	\$ 82,706.45	48	Households		0
Oklahoma City Housing Authority Mod Rehab	\$ 235,000.00	\$ 235,000.00	\$ -	13	Units		0
Oklahoma City Housing Authority Inspection Program	\$ 50,000.00	\$ -	\$ 50,000.00	122	Units		0
Jefferson Park CDBG Acq. And infrastructure	\$ 162,314.53	\$ 124,814.53	\$ 37,500.00	0	Project	Infrastructure for LMH Development	1
MHAO Housing Acquisition-Rehabilitation (Taylor Ridge)	\$ 648,449.00	\$ 648,449.00	\$ -	0	Units		54
<b>Housing Services</b>							
Pest Inspection Program	\$ 24,000.00	\$ -	\$ 24,000.00	0	Units		0
<b>Strong Neighborhoods Initiative (SNI) Public Facilities</b>							
SNI Program Delivery	\$ 100,000.00	\$ 100,000.00	\$ -				
Parks Projects	\$ 1,166,000.00	\$ 35,241.20	\$ 1,130,758.80	0	Project	NOTE: Design underway	1642
Sidewalks-SNI	\$ 984,000.00	\$ 696,550.96	\$ 287,449.04	1,642	Households		0
Tree Plantings	\$ 10,000.00	\$ 5,732.90	\$ 4,267.10	17	Households		0
PF Neighborhood Projects	\$ 96,800.00	\$ 55,525.00	\$ 41,275.00	3,214	Households		0
<b>Strong Neighborhoods Initiative (SNI) Public Services</b>							
SNI Hazardous Tree Removal	\$ 118,896.00	\$ 58,144.33	\$ 60,751.67	20	Households		0
After School Programs	\$ 387,104.00	\$ 367,751.15	\$ 19,352.85	250	Persons/Youth		0
Neighborhood Clean Up Program	\$ 24,000.00	\$ 3,025.47	\$ 20,974.53	5	Persons/Households		0
Summer Youth Program (Save Our Youth)	\$ 4,000.00	\$ -	\$ 4,000.00	250	Persons/Youth		0
<b>Public Facilities (non-SNI)</b>							
Wellness Center 3	\$ 23,500.00	\$ -	\$ 23,500.00	0	Project	Public Art	1
Pitts Park	\$ 10,000.00	\$ -	\$ 10,000.00	0	Project	Public Art	1
OCURA-Mirimar Sewer Extension	\$ 478,535.00	\$ -	\$ 478,535.00	0	Project		0
Unprogrammed-Available for Solicitation	\$ 630,371.23	\$ -	\$ 630,371.23				0
<b>Public Services (non-SNI)</b>							
Healing Hands Public Service-CHCI	\$ 60,000.00	\$ 60,000.00	\$ -	500	Persons		0
Legal Assistance	\$ 84,250.00	\$ 84,250.00	\$ -	90	Persons/Households		0
CASA Child Advocacy Services	\$ 8,483.25	\$ 8,366.40	\$ 116.85	0	Persons/Households		0
Share-A-Fare (Bus and Taxi Fares)	\$ 105,000.00	\$ 100,637.08	\$ 4,362.92	63,340	Fares/Bus Passes	uplicated services	0
<b>Slum and Blight Remediation</b>							
Secure Vacant & Abandoned Properties	\$ 220,000.00	\$ 180,873.50	\$ 39,126.50	143	Units		0
Code Enforcement Title Inspection Program	\$ 30,000.00	\$ -	\$ 30,000.00		Units		
OCURA Urban Renewal Completions	\$ 788,880.00	\$ 788,880.00	\$ -	10	Units		138
<b>Economic Development Activities</b>							
<b>CAA Small Business Services</b>							
Small Business Training Attendance	\$ 40,000.00	\$ 40,000.00	\$ -	139	Businesses		0
Businesses Assisted with Loans				16	Businesses		0
New Businesses Trained or TA				80	Businesses		0
Existing Businesses Trained or TA				59	Businesses/Persons		0
Section 108 Repayment Contingency	\$ 950,000.00	\$ 948,520.60	\$ 1,479.40				
<b>Administration, Planning and Fair Housing Activities</b>							
General Program Administration	\$ 887,331.51	\$ 674,277.23	\$ 213,054.28				
Planning	\$ 50,000.00	\$ 48,959.30	\$ 1,040.70				
Fair Housing Activities	\$ 93,000.00	\$ 92,300.00	\$ 700.00	385	Persons/Households		
UNALLOCATED PI/UNPROGRAMMED FUNDS	\$ 134,409.67	\$ -	\$ 134,409.67				
<b>Total</b>	<b>\$ 10,564,324.19</b>	<b>\$ 6,990,605.02</b>	<b>\$ 3,573,719.17</b>	<b>70,376</b>			<b>1,837</b>

HOME INVESTMENT PARTNERSHIPS PROGRAM							
				COMPLETED			UNDERWAY
<b>DOWN PAYMENT ASSISTANCE PROGRAM</b>							
	\$ 625,000.00	\$ 233,564.47	\$ 391,435.53	15	Households	Financial Assistance	0
<b>HOUSING REHABILITATION-WHOLE HOUSE REHAB PROGRAM</b>							
	\$ 737,000.00	\$ 267,616.21	\$ 469,383.79	6	Households		1
<b>AFFORDABLE HOUSING DEVELOPMENT PROGRAM</b>							
			\$ -	0			
OCHA Creston Park Care Suites	\$ 800,000.00	\$ -	\$ 800,000.00	0	Units	Assisted Living Facility	0
Unallocated-For Competitive Solicitation	\$ 2,047,934.13	\$ -	\$ 2,047,934.13	0	TBD		0
<b>COMMUNITY HOUSING DEVELOPMENT ORGANIZATIONS</b>							
Jefferson Park	\$ 304,731.88	\$ 295,129.02	\$ 9,602.86	2	Units	SF Residences for Sale to LMI Buyers	3
Jefferson Park-Predevelopment Loan	\$ 53.25	\$ -	\$ 53.25	0	Units	SF Residences for Sale to LMI Buyers	1
Oklahoma City Housing Services Redevelopment Corp. (Paseo)	\$ 325,000.00	\$ 275,214.59	\$ 49,785.41	0	Units	SF Residences for Sale to LMI Buyers	3
Paseo Walnut Project-Predevelopment Loan	\$ 2,110.82	\$ -	\$ 2,110.82	0	Units	SF Residences for Sale to LMI Buyers	1
Neighborhood Housing Services	\$ -	\$ -	\$ -				
Unallocated CHDO	\$ 1,368,822.89	\$ -	\$ 1,368,822.89				
<b>ADMINISTRATION</b>							
	\$ 1,121,573.91	\$ 215,267.15	\$ 906,306.76				
UNALLOCATED PI/UNPROGRAMMED FUNDS	\$ 207,194.18	\$ 0.00	\$ 207,194.18				
<b>Total</b>	<b>\$ 7,539,421.06</b>	<b>\$ 1,286,791.44</b>	<b>\$ 6,252,629.62</b>	<b>23</b>			<b>9</b>

**EMERGENCY SOLUTIONS GRANT**

					# SERVED	
Comm. Health Centers	\$ 25,000.00	\$ 25,000.00	\$ -	1,432	Persons	
City Care	\$ 40,000.00	\$ 40,000.00	\$ -	2,160	Persons	
Salvation Army	\$ 5,250.00	\$ 5,250.00	\$ -	6	Persons	
Legal Aid	\$ 26,654.00	\$ 26,464.00	\$ 190.00	446	Persons	
MHAO	\$ 60,000.00	\$ 60,000.00	\$ -	327	Persons	
PIVOT	\$ 9,000.00	\$ 9,000.00	\$ -	63	Persons	
Positive Tomorrows	\$ 22,500.00	\$ 22,500.00	\$ -	20	Persons	
SISU Youth	\$ 10,000.00	\$ 10,000.00	\$ -	129	Persons	
The Homeless Alliance	\$ 150,000.00	\$ 88,149.78	\$ 69,177.14	563	Persons	
Upward Transitions	\$ 31,936.39	\$ 31,936.39	\$ -	56	Persons	
YWCA	\$ 27,000.00	\$ 27,000.00	\$ -	384	Persons	
City Administration	\$ 49,255.04	\$ 18,301.25	\$ 30,953.79			
<b>Total</b>	<b>\$ 456,595.43</b>	<b>\$ 363,601.42</b>	<b>\$ 100,320.93</b>	<b>5,586</b>		

**HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS**

					# SERVED	
					HOUSEHOLDS	
Homeless Alliance						
Homeless Alliance Administration	\$ 167,617.09	\$ 29,739.77	\$ 137,877.32	0	Households	
Emergency Housing Assistance	\$ 90,926.45	\$ 90,926.45	\$ -	30	Households	
Permanent Housing Placement	\$ 120,757.03	\$ 48,809.52	\$ 71,947.51	55	Households	
Short Term Rent, Mortgage, & Utility	\$ 217,345.02	\$ 153,018.01	\$ 64,327.01	89	Households	
Supportive Services	\$ 407,735.30	\$ 376,949.77	\$ 30,785.53	339	Households	
Tenant Based Rental Assistance	\$ 499,613.83	\$ 172,633.34	\$ 326,980.49	45	Households	
City Administration	\$ 74,898.00	\$ 21,049.43	\$ 53,848.57			
<b>Total</b>	<b>\$ 1,578,892.72</b>	<b>\$ 893,126.29</b>	<b>\$ 685,766.43</b>	<b>558</b>		

**CONTINUUM OF CARE GRANTS**

					# SERVED	
G80340 Homeless Alliance Building Foundations	\$ 155,986.49	\$ 155,986.49	\$ -	164	Persons	
G80342 Heartline	\$ 4,545.95	\$ 4,545.95	\$ -	0	Persons	
G80344 HMIS	\$ 41,060.99	\$ 41,060.99	\$ -	0	Persons	
G80346 HOPE HHP	\$ 40,902.54	\$ 40,902.54	\$ -	32	Persons	
G80347 HOPE HPH	\$ 141,632.17	\$ 141,632.17	\$ -	51	Persons	
G80349 Homeless Alliance JH	\$ 168,487.80	\$ 168,487.80	\$ -	70	Persons	
G80350 MHAO LTS	\$ 92,955.67	\$ 89,019.78	\$ 3,935.89	18	Persons	
G80363 Homeless Alliance	\$ 473,239.00	\$ 360,609.83	\$ 112,629.17	146	Persons	
G80364 CEC	\$ 92,956.00	\$ 92,956.00	\$ -	31	Persons	
G80365 Heartline	\$ 20,597.50	\$ 15,060.59	\$ 5,536.91	0	Persons	
G80366 Homeless Alliance	\$ 105,000.00	\$ 86,748.59	\$ 18,251.41	0	Persons	
G80367 HOPE CH 32	\$ 234,114.37	\$ 233,664.51	\$ 449.86	53	Persons	
G80368 HOPE HHP	\$ 185,735.00	\$ 111,833.35	\$ 73,901.65	32	Persons	
G80369 HOPE HPS	\$ 348,941.50	\$ 144,906.50	\$ 204,035.00	44	Persons	
G80370 HOPE SC39	\$ 314,421.14	\$ 297,581.45	\$ 16,839.69	58	Persons	
G80371 Homeless Alliance	\$ 356,516.00	\$ 205,008.00	\$ 151,508.00	74	Persons	
G80372 MHAO	\$ 203,923.00	\$ 59,799.84	\$ 144,123.16	16	Persons	
G80373 MHAO	\$ 361,485.77	\$ 317,550.12	\$ 43,935.65	49	Persons	
G80374 Red Rock Parkside	\$ 53,500.58	\$ 53,500.58	\$ -	15	Persons	
G80375 Red Rock Lodges	\$ 146,740.50	\$ 131,292.04	\$ 15,448.46	35	Persons	
G80376 City Care Pershing	\$ 326,136.00	\$ 326,136.00	\$ -	84	Persons	
G80377 City Care Westlawn	\$ 207,964.00	\$ 207,964.00	\$ -	30	Persons	
City Administration	\$ 161,685.85	\$ 122,031.06	\$ 39,654.79			
<b>Total</b>	<b>\$ 4,238,527.82</b>	<b>\$ 3,408,278.18</b>	<b>\$ 830,249.64</b>	<b>1002</b>		

**CITY SOCIAL SERVICES GRANTS**

Catholic Charities	\$ 10,000.00	\$ 10,000.00	\$ -			Operational Support
City Care	\$ 12,000.00	\$ 12,000.00	\$ -			Operational Support
Community Health Centers, Inc.	\$ 5,750.00	\$ 5,750.00	\$ -			Operational Support
Good Shepherd Ministries	\$ 2,500.00	\$ 2,500.00	\$ -			Operational Support
Heartline, Inc.	\$ 22,400.00	\$ 22,400.00	\$ -			Operational Support
Legal Aid Services of Oklahoma, Inc.	\$ 5,000.00	\$ 5,000.00	\$ -			Operational Support
NSO	\$ 4,500.00	\$ 4,500.00	\$ -			Operational Support
Pivot	\$ 13,200.00	\$ 13,200.00	\$ -			Operational Support
Positive Tomorrows	\$ 15,000.00	\$ 15,000.00	\$ -			Operational Support
SISU Youth	\$ 11,650.00	\$ 10,500.00	\$ 1,150.00			Operational Support
Upward Transitions	\$ 12,000.00	\$ 12,000.00	\$ -			Operational Support
Urban league of Greater OKC, Inc.	\$ 5,000.00	\$ 5,000.00	\$ -			Operational Support
YWCA of Oklahoma City	\$ 2,000.00	\$ 2,000.00	\$ -			Operational Support
<b>Total</b>	<b>\$ 121,000.00</b>	<b>\$ 119,850.00</b>	<b>\$ 1,150.00</b>			

**COMMUNITY DEVELOPMENT BLOCK GRANT-CV FUNDING (FY 2019)**

Multifamily Housing Acquisition/Rehab	\$ 4,151,551.00	\$ 2,072,013.00	\$ 2,079,538.00	54	Housing Units	L/M Housing Assistance
Short Term Housing and Utility Assistance Program	\$ 48,381.71	\$ 48,381.31	\$ 0.40	626	Households	Emergency Housing Assistance
Nonprofit & Business Assistance Program	\$ 91,787.23	\$ 91,787.09	\$ 0.14	75	Businesses	PPE,Supplies,Operations,Equipment
Heartline	\$ 12,690.92	\$ 12,690.92	\$ -			
City Administration	\$ 339,855.68	\$ 122,424.42	\$ 217,431.26			
<b>Total</b>	<b>\$ 4,644,266.54</b>	<b>\$ 2,347,296.74</b>	<b>\$ 2,296,969.80</b>	<b>755</b>		

**EMERGENCY SOLUTIONS GRANT - COVID**

				<b># SERVED</b>	
ReMerge	\$ 140,000.00	\$ -	\$ 140,000.00	1	Persons
YWCA	\$ 80,562.00	\$ -	\$ 80,562.00	0	Persons
Catholic Charities	\$ 47,677.20	\$ 28,793.71	\$ 18,883.49	159	Persons
City Rescue Mission	\$ 736,061.89	\$ 592,268.63	\$ 143,793.26	1571	Persons
Homeless Alliance	\$ 1,726,556.94	\$ 995,398.17	\$ 731,158.77	2,154	Persons
Legal Aid	\$ 23,953.93	\$ 23,953.93	\$ 0.00	602	Persons
MHAO	\$ 3,571.57	\$ 3,571.57	\$ 0.00	0	Persons
NSO	\$ 148,742.54	\$ 59,822.08	\$ 88,920.46	12	Persons
Pivot	\$ 248,938.43	\$ 171,916.19	\$ 77,022.24	55	Persons
Positive Tomorrows	\$ 163,040.48	\$ 119,632.51	\$ 43,407.97	147	Persons
Sisu Youth	\$ 321,008.30	\$ 77,150.00	\$ 243,858.30	129	Persons
Upward Transitions	\$ 341,065.07	\$ 184,950.94	\$ 156,114.13	101	Persons
City Care	\$ 656,745.00	\$ 524,240.52	\$ 132,504.48	2160	Persons
Salvation Army	\$ 100,000.00	\$ 77,034.43	\$ 22,965.57	1044	Persons
City Administration	\$ 279,588.37	\$ 47,323.67	\$ 232,264.70		
<b>Total</b>	<b>\$ 5,017,511.72</b>	<b>\$ 2,906,056.35</b>	<b>\$ 2,111,455.37</b>	<b>8135</b>	

**HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS - COVID**

				<b># SERVED</b>	
				<b>HOUSEHOLDS</b>	
Homeless Alliance					
Homeless Alliance Administration	\$ 9,476.76	\$ 870.83	\$ 8,605.93	0	Households
Emergency Housing Assistance	\$ 35,076.00	\$ 22,507.56	\$ 12,568.44	20	Households
Short Term Rent, Mortgage, & Utility	\$ 42,690.24	\$ 16,376.06	\$ 26,314.18	34	Households
City Administration	\$ 943.27	\$ 943.27	\$ -	0	Households
<b>Total</b>	<b>\$ 88,186.27</b>	<b>\$ 40,697.72</b>	<b>\$ 47,488.55</b>	<b>54</b>	

# APPENDIX 3

## HUD IDIS PR-REPORTS



**PART I: SUMMARY OF CDBG RESOURCES**

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	5,308,822.52
02 ENTITLEMENT GRANT	5,117,092.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	4,000,000.00
05 CURRENT YEAR PROGRAM INCOME	399,409.67
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	(4,265,000.00)
08 TOTAL AVAILABLE (SUM, LINES 01-07)	10,560,324.19

**PART II: SUMMARY OF CDBG EXPENDITURES**

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	9,815,568.80
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	(4,589,020.91)
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	5,226,547.89
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	824,016.17
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	948,520.60
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	(8,479.64)
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	6,990,605.02
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	3,569,719.17

**PART III: LOWMOD BENEFIT THIS REPORTING PERIOD**

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	220,710.30
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	648,449.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	5,850,059.79
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	(2,611,262.35)
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	4,107,956.74
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	78.60%

**LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS**

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: 2020 PY: 2021 PY: 2022
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	15,340,117.37
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	12,524,031.87
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	81.64%

**PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS**

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	679,148.96
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	3,025.47
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	682,174.43
32 ENTITLEMENT GRANT	5,117,092.00
33 PRIOR YEAR PROGRAM INCOME	2,204,634.10
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	7,321,726.10
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	9.32%

**PART V: PLANNING AND ADMINISTRATION (PA) CAP**

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	824,016.17
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	(8,479.64)
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	815,536.53
42 ENTITLEMENT GRANT	5,117,092.00
43 CURRENT YEAR PROGRAM INCOME	399,409.67
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	5,516,501.67
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	14.78%

**LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17**

Plan Year	IDIS Project	IDIS Activity	voucher Number	Activity Name	matrix Cat	National Objective	Target Area Type	Drawn Amount
2021	2	6086	6523745	1400 NW 10 - HEMP-4524 SNI INSIDE	14A	LMH	Strategy area	\$18,347.00
2021	2	6096	6535448	1812 NW 10 - HEMP-4694 SNI INSIDE	14A	LMH	Strategy area	\$16,807.00
2021	2	6107	6564096	HEMP-4697 - 3012 SW 27 - Beyond Roofing	14A	LMH	Strategy area	\$32.00
2021	2	6107	6569788	HEMP-4697 - 3012 SW 27 - Beyond Roofing	14A	LMH	Strategy area	\$16,700.00
2021	2	6107	6571390	HEMP-4697 - 3012 SW 27 - Beyond Roofing	14A	LMH	Strategy area	\$8.00
2021	2	6109	6560097	HEMP-4768 - 3236 NW 30 - DDZ Construction	14A	LMH	Strategy area	\$19,332.00
2021	2	6122	6593262	HEMP-4673 - 2600 S Durland - GIG Construction	14A	LMH	Strategy area	\$10,312.30
2021	2	6159	6613983	HEMP-4682 - 1738 NW 7 - Beyond Roofing	14A	LMH	Strategy area	\$11,700.00
2021	2	6161	6630357	HEMP-4703 - 1024 NE 27 - DDZ Construction	14A	LMH	Strategy area	\$18,200.00
2021	2	6161	6633061	HEMP-4703 - 1024 NE 27 - DDZ Construction	14A	LMH	Strategy area	\$72.00
2021	2	6164	6638136	HEMP-4803- 214 SE 24- Elite Level	14A	LMH	Strategy area	\$20,553.00
2021	2	6165	6630357	HEMP-4794- 804 NE 36- DDZ Construction	14A	LMH	Strategy area	\$20,330.00
2021	2	6167	6630357	HEMP - 4760 - 2216 NE 18th - Maverick Construction	14A	LMH	Strategy area	\$10,257.00

2021	2	6169	6630357	HEMP-4793 - 3113 N. Lindsay - Traylee & L Construction	14A	LMH	Strategy area	\$9,678.00
2021	2	6172	6651165	HEMP - 4791 - 806 SW 24 - Beyond Roofing	14A	LMH	Strategy area	\$12,834.00
2021	2	6172	6651882	HEMP - 4791 - 806 SW 24 - Beyond Roofing	14A	LMH	Strategy area	\$90.00
2021	2	6183	6633061	HEMP - 4810 - 1809 NW 9th - DDZ Construction	14A	LMH	Strategy area	\$72.00
2021	2	6183	6641392	HEMP - 4810 - 1809 NW 9th - DDZ Construction	14A	LMH	Strategy area	\$12,443.00
2021	2	6190	6660040	HEMP - 4811 - 1709 NE 14th - Elite Level	14A	LMH	Strategy area	\$22,943.00
<b>Total</b>								<b>\$220,710.30</b>
<b>14A Matrix Code J</b>								<b>\$220,710.30</b>

**LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18**

Plan Year	IDIS Project	IDIS Activity	Activity Name	Matrix Code	National Objective	Drawn Amount
2016	14	5403	Meadow Cliff Apts - 7507 S Ross Ave - MF Housing Rehab	14B	LMH	\$252,907.50
2021	1	6171	Taylor Ridge Apt Acquisition/Rehab-4759 NW 36-Mental Health Assoc.	14B	LMH	\$648,449.00
<b>Total</b>						<b>\$901,356.50</b>
<b>14B Matrix Code</b>						<b>\$901,356.50</b>

**LINE 19 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 19**

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2021	7	6131	6560446	SNI Metro Park Triangle Sign Project FY 21-22	03E	LMA	\$3,200.00
2021	7	6188	6638616	SNI Art Projects FY 21-22	03E	LMA	\$19,169.00
2021	7	6188	6658462	SNI Art Projects FY 21-22	03E	LMA	\$27,781.00
2021	7	6188	6665971	SNI Art Projects FY 21-22	03E	LMA	\$5,375.00
<b>Total</b>						<b>\$55,525.00</b>	
<b>03E Matrix Code</b>						<b>\$55,525.00</b>	
2021	7	6130	6560450	SNI Captiol Hill Plaza Engineering PC-0785 FY 21-22	03F	LMA	\$25,395.80
2021	7	6130	6577736	SNI Captiol Hill Plaza Engineering PC-0785 FY 21-22	03F	LMA	\$8,345.40
2021	7	6130	6665950	SNI Captiol Hill Plaza Engineering PC-0785 FY 21-22	03F	LMA	\$1,500.00
<b>Total</b>						<b>\$35,241.20</b>	
<b>03F Matrix Code</b>						<b>\$35,241.20</b>	
2021	7	6186	6629853	SNI Capitol Hill Sidewalk Project Phase III MS-0088 FY 21-22	03K	LMA	\$55,866.58
2021	7	6186	6651163	SNI Capitol Hill Sidewalk Project Phase III MS-0088 FY 21-22	03K	LMA	\$146,420.65
<b>Total</b>						<b>\$202,287.23</b>	
<b>03K Matrix Code</b>						<b>\$202,287.23</b>	
2021	7	6119	6593276	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$138,161.03
2021	7	6119	6605566	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$214,769.13
2021	7	6119	6629853	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$33,628.17
2021	7	6119	6629863	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$12,221.75
2021	7	6119	6638634	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$93,387.90
2021	7	6119	6641972	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$215.00
2021	7	6119	6651268	SNI Capitol Hill Sidewalk Project Phase II MS-0088 FY 21-22	03L	LMA	\$1,880.75
2021	8	6118	6548223	SNI Program Delivery FY 21-22	03L	LMA	\$14,516.46
2021	8	6118	6560061	SNI Program Delivery FY 21-22	03L	LMA	\$11,416.08
2021	8	6118	6564071	SNI Program Delivery FY 21-22	03L	LMA	\$3,918.86
2021	8	6118	6569776	SNI Program Delivery FY 21-22	03L	LMA	\$3,840.29
2021	8	6118	6578475	SNI Program Delivery FY 21-22	03L	LMA	\$8,016.10
2021	8	6118	6588007	SNI Program Delivery FY 21-22	03L	LMA	\$8,975.25
2021	8	6118	6593249	SNI Program Delivery FY 21-22	03L	LMA	\$3,977.20
2021	8	6118	6599576	SNI Program Delivery FY 21-22	03L	LMA	\$4,055.96
2021	8	6118	6605603	SNI Program Delivery FY 21-22	03L	LMA	\$3,977.21
2021	8	6118	6630305	SNI Program Delivery FY 21-22	03L	LMA	\$20,239.40
2021	8	6118	6638606	SNI Program Delivery FY 21-22	03L	LMA	\$4,026.00
2021	8	6118	6658444	SNI Program Delivery FY 21-22	03L	LMA	\$12,596.85
2021	8	6118	6672646	SNI Program Delivery FY 21-22	03L	LMA	\$444.34
<b>Total</b>						<b>\$594,263.73</b>	
<b>03L Matrix Code</b>						<b>\$594,263.73</b>	
2021	7	6194	6659132	SNI Tree Planting FY 21-22	03N	LMA	\$5,568.20
<b>Total</b>						<b>\$5,568.20</b>	
<b>03N Matrix Code</b>						<b>\$5,568.20</b>	
2020	13	6008	6564094	CDBG Legal Services FY 20-21	05C	LMC	\$84,250.00
<b>Total</b>						<b>\$84,250.00</b>	
<b>05C Matrix Code</b>						<b>\$84,250.00</b>	
2020	13	6056	6535450	CASA FY 20-21	05D	LMC	\$2,390.75
2020	13	6056	6560063	CASA FY 20-21	05D	LMC	\$5,975.65
<b>Total</b>						<b>\$8,366.40</b>	
<b>05D Matrix Code</b>						<b>\$8,366.40</b>	
2021	5	6127	6560092	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	05Z	LMC	\$2,856.00
2021	5	6127	6564098	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	05Z	LMC	\$1,428.00
2021	5	6127	6588012	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	05Z	LMC	\$7,841.75
2021	5	6127	6588046	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	05Z	LMC	\$504.00
2021	5	6127	6605548	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	05Z	LMC	\$31,085.58
2021	5	6127	6629903	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	05Z	LMC	\$14,429.00
2021	5	6143	6569803	SNI After School Program FY 21-22	05Z	LMA	\$54,381.66
2021	5	6143	6593266	SNI After School Program FY 21-22	05Z	LMA	\$30,160.44
2021	5	6143	6605550	SNI After School Program FY 21-22	05Z	LMA	\$24,221.22
2021	5	6143	6629896	SNI After School Program FY 21-22	05Z	LMA	\$79,116.28
2021	5	6143	6641973	SNI After School Program FY 21-22	05Z	LMA	\$6,094.00
2021	5	6143	6658466	SNI After School Program FY 21-22	05Z	LMA	\$30,373.46
2021	5	6143	6665581	SNI After School Program FY 21-22	05Z	LMA	\$143,404.09
2021	6	6132	6560449	SHARE-A-FARE METRO TRANSIT FY 21-22	05Z	LMC	\$15,174.95
2021	6	6132	6588031	SHARE-A-FARE METRO TRANSIT FY 21-22	05Z	LMC	\$21,429.00
2021	6	6132	6629876	SHARE-A-FARE METRO TRANSIT FY 21-22	05Z	LMC	\$54,811.12
2021	6	6132	6638633	SHARE-A-FARE METRO TRANSIT FY 21-22	05Z	LMC	\$9,222.01
2021	6	6149	6588029	CHCI-FY 21-22	05Z	LMC	\$5,692.64
2021	6	6149	6588044	CHCI-FY 21-22	05Z	LMC	\$47,590.60

2021	6	6149	6613994	CHCI-FY 21-22			05Z	LMC	\$6,716.76
							<b>05Z</b>	<b>Matrix Code</b>	<b>\$586,532.56</b>
2021	5	6116	6566969	SNI Safe and Tidy FY 21-22			06	LMA	\$367.97
2021	5	6116	6578416	SNI Safe and Tidy FY 21-22			06	LMA	\$903.00
2021	5	6116	6638625	SNI Safe and Tidy FY 21-22			06	LMA	\$1,754.50
							<b>06</b>	<b>Matrix Code</b>	<b>\$3,025.47</b>
2021	2	6124	6560093	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$27,900.00
2021	2	6124	6588010	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$32,440.00
2021	2	6124	6593266	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$72,115.00
2021	2	6124	6605549	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$26,400.00
2021	2	6124	6629907	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$29,949.00
2021	2	6124	6638627	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$20,675.00
2021	2	6124	6658466	HOUSING AUTHORITY PUBLIC MODERNIZATION-OCHA-FY 21-22			14C	LMH	\$25,521.00
							<b>14C</b>	<b>Matrix Code</b>	<b>\$235,000.00</b>
2004	41	5923	6550337	Section 108 RLF for Micro and Small Business Economic Dev			18A	LMASA	\$4,000,000.00
							<b>18A</b>	<b>Matrix Code</b>	<b>\$4,000,000.00</b>
2021	9	6129	6560445	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$14,908.44
2021	9	6129	6588026	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$2,329.43
2021	9	6129	6593272	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$2,219.40
2021	9	6129	6605556	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$3,698.39
2021	9	6129	6629872	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$6,953.47
2021	9	6129	6641972	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$4,613.34
2021	9	6129	6651271	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$4,222.59
2021	9	6129	6665599	CAA SMALL BUSINESS ASSISTANCE FY 21-22			18B	LMA	\$1,054.94
							<b>18B</b>	<b>Matrix Code</b>	<b>\$40,000.00</b>
<b>Total</b>									<b>\$5,850,059.79</b>

**LINE 27 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 27**

Plan	UDIS	UDIS	Voucher	Activity to	Activity Name	Grant Number	Run	Matrix	National	Drawn Amount
	Detail	Detail	Number	Prevent			Time	Code	Objective	
2020	13	6008	6564094	No	CDBG Legal Services FY 20-21	B19MC400003	EN	05C	LMC	\$84,250.00
								<b>05C</b>	<b>Matrix Code</b>	<b>\$84,250.00</b>
2020	13	6056	6535450	No	CASA FY 20-21	B18MC400003	EN	05D	LMC	\$2,390.75
2020	13	6056	6560063	No	CASA FY 20-21	B18MC400003	EN	05D	LMC	\$5,975.65
								<b>05D</b>	<b>Matrix Code</b>	<b>\$8,366.40</b>
2021	5	6127	6560092	No	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	B18MC400003	EN	05Z	LMC	\$2,856.00
2021	5	6127	6564098	No	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	B18MC400003	EN	05Z	LMC	\$1,428.00
2021	5	6127	6588012	No	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	B20MC400003	EN	05Z	LMC	\$7,841.75
2021	5	6127	6588046	No	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	B18MC400003	EN	05Z	LMC	\$504.00
2021	5	6127	6605548	No	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	B20MC400003	EN	05Z	LMC	\$31,085.58
2021	5	6127	6629903	No	SNI Urban Forestry-Hazardous Tree Removal FY 21-22	B20MC400003	EN	05Z	LMC	\$14,429.00
2021	5	6143	6569803	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$54,381.66
2021	5	6143	6593266	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$30,160.44
2021	5	6143	6605550	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$24,221.22
2021	5	6143	6629896	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$79,116.28
2021	5	6143	6641973	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$6,094.00
2021	5	6143	6658466	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$30,373.46
2021	5	6143	6665581	No	SNI After School Program FY 21-22	B20MC400003	EN	05Z	LMA	\$143,404.09
2021	6	6132	6560449	No	SHARE-A-FARE METRO TRANSIT FY 21-22	B19MC400003	EN	05Z	LMC	\$15,174.95
2021	6	6132	6588031	No	SHARE-A-FARE METRO TRANSIT FY 21-22	B19MC400003	EN	05Z	LMC	\$21,429.00
2021	6	6132	6629876	No	SHARE-A-FARE METRO TRANSIT FY 21-22	B19MC400003	EN	05Z	LMC	\$54,811.12
2021	6	6132	6638633	No	SHARE-A-FARE METRO TRANSIT FY 21-22	B19MC400003	EN	05Z	LMC	\$9,222.01
2021	6	6149	6588029	No	CHCI-FY 21-22	B19MC400003	EN	05Z	LMC	\$5,692.64
2021	6	6149	6588044	No	CHCI-FY 21-22	B18MC400003	EN	05Z	LMC	\$47,590.60
2021	6	6149	6613994	No	CHCI-FY 21-22	B19MC400003	EN	05Z	LMC	\$6,716.76
								<b>05Z</b>	<b>Matrix Code</b>	<b>\$586,532.56</b>
<b>Total</b>				<b>No</b>	<b>Activity to prevent, prepare for, and respond to Coronavirus</b>					<b>\$679,148.96</b>
										<b>\$679,148.96</b>

**LINE 37 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 37**

Plan	UDIS	UDIS	Voucher	Activity Name	Matrix	National	Drawn Amount
	Detail	Detail	Number		Code	Objective	
2021	11	6112	6548223	PLANNING ACTIVITIES-2021	20		\$11,511.90
2021	11	6112	6560058	PLANNING ACTIVITIES-2021	20		\$8,968.74
2021	11	6112	6564071	PLANNING ACTIVITIES-2021	20		\$3,590.92
2021	11	6112	6569776	PLANNING ACTIVITIES-2021	20		\$2,380.21
2021	11	6112	6578475	PLANNING ACTIVITIES-2021	20		\$5,197.81
2021	11	6112	6588007	PLANNING ACTIVITIES-2021	20		\$4,122.76
2021	11	6112	6593249	PLANNING ACTIVITIES-2021	20		\$606.38
2021	11	6112	6599576	PLANNING ACTIVITIES-2021	20		\$4,116.32
2021	11	6112	6605603	PLANNING ACTIVITIES-2021	20		\$1,606.39
2021	11	6112	6630305	PLANNING ACTIVITIES-2021	20		\$3,200.69
2021	11	6112	6638606	PLANNING ACTIVITIES-2021	20		\$1,175.21
2021	11	6112	6658444	PLANNING ACTIVITIES-2021	20		\$2,263.42
2021	11	6112	6672638	PLANNING ACTIVITIES-2021	20		\$218.55
					<b>20</b>	<b>Matrix Code</b>	<b>\$48,959.30</b>
2018	31	5699	6535450	CDBG ADMINISTRATION-2018	21A		\$2,576.65
2018	31	5699	6560055	CDBG ADMINISTRATION-2018	21A		\$2,548.03
2018	31	5699	6660389	CDBG ADMINISTRATION-2018	21A		\$8,314.94

2021	11	6111	6548223	CDBG ADMINISTRATION-2021	21A	\$109,928.39	
2021	11	6111	6560053	CDBG ADMINISTRATION-2021	21A	\$70,301.59	
2021	11	6111	6565197	CDBG ADMINISTRATION-2021	21A	\$33,324.16	
2021	11	6111	6569776	CDBG ADMINISTRATION-2021	21A	\$25,154.75	
2021	11	6111	6578475	CDBG ADMINISTRATION-2021	21A	\$53,230.01	
2021	11	6111	6588007	CDBG ADMINISTRATION-2021	21A	\$55,862.40	
2021	11	6111	6593249	CDBG ADMINISTRATION-2021	21A	\$24,921.87	
2021	11	6111	6599576	CDBG ADMINISTRATION-2021	21A	\$42,053.95	
2021	11	6111	6605603	CDBG ADMINISTRATION-2021	21A	\$8,271.77	
2021	11	6111	6630305	CDBG ADMINISTRATION-2021	21A	\$133,459.95	
2021	11	6111	6633059	CDBG ADMINISTRATION-2021	21A	\$16,570.60	
2021	11	6111	6638606	CDBG ADMINISTRATION-2021	21A	\$19,398.74	
2021	11	6111	6658444	CDBG ADMINISTRATION-2021	21A	\$64,531.86	
2021	11	6111	6675043	CDBG ADMINISTRATION-2021	21A	\$12,307.21	
2021	11	6133	6566929	METROPOLITAN FAIR HOUSING COUNCIL FY 21-22	21A	\$27,875.00	
2021	11	6133	6578475	METROPOLITAN FAIR HOUSING COUNCIL FY 21-22	21A	\$12,210.00	
2021	11	6133	6605603	METROPOLITAN FAIR HOUSING COUNCIL FY 21-22	21A	\$15,435.50	
2021	11	6133	6630281	METROPOLITAN FAIR HOUSING COUNCIL FY 21-22	21A	\$32,313.50	
2021	11	6133	6665602	METROPOLITAN FAIR HOUSING COUNCIL FY 21-22	21A	\$4,466.00	
<b>Total</b>					<b>21A</b>	<b>Matrix Code</b>	<b>\$775,056.87</b>
							<b>\$824,016.17</b>



CDBG  
PR26 Adjustment Reconciliations  
PY 2021

Line	Amount	
	7 \$ (4,000,000.00)	Voucher #6550337 Psuedo Draw 10-6-21
	7 \$ (265,000.00)	PI is from 2017 and not entered in IDIS due to error, PI was previously included on city books
Total Line	<u>\$ (4,265,000.00)</u>	

Line		
	10 \$ (4,000,000.00)	Voucher #6550337 Psuedo Draw 10-6-21
	10 \$ (336,278.11)	Activity 5050 Prior Year Draw Previously Reported
	10 \$ (252,907.50)	Activity 5403 Prior Year Draw Previously Reported
	10 \$ 164.70	Activity 6046 Prior Year Draw Previously Reported
	<u>\$ (4,589,020.91)</u>	

Line		
	14 \$ (8,479.64)	Activity 5699 Voucher # is adjusted Prior Year Draw
	<u>\$ (8,479.64)</u>	

	20 \$ (4,000,000.00)	Voucher #6550337 Psuedo Draw 10-6-21
	20 \$ 577,293.55	Activity 6128 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 468,634.10	Activity 6011 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 15,019.00	Activity 6090 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 22,122.00	Activity 6092 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 19,227.00	Activity 6093 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 20,822.00	Activity 6108 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 8,763.00	Activity 6110 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 16,000.00	Activity 6120 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 21,050.00	Activity 6121 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 17,372.00	Activity 6125 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 12,640.00	Activity 6144 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 17,957.00	Activity 6146 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 11,852.00	Activity 6147 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 21,275.00	Activity 6148 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 23,032.00	Activity 6150 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 19,585.00	Activity 6153 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 3,605.00	Activity 6155 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 20,757.00	Activity 6162 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 20,077.00	Activity 6163 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 14,875.00	Activity 6181 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 8,488.00	Activity 6182 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20
	20 \$ 15,915.00	Activity 6191 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20

CDBG  
PR26 Adjustment Reconciliations

PY 2021

20 \$ 12,377.00 Activity 6192 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 20  
Total Line \$ (2,611,262.35)

30 \$ 3,025.47 Activity 6116 Not Reflected in Line 27 Detail: Activities Included in the Computation of Line 27  
Total Line \$ 3,025.47

40 \$ (8,479.64) Activity 5699 Voucher # is adjusted Prior Year Draw

	2020	2021	2022	Total
Line #24 (Line #11)	\$ 4,475,946.31	\$ 5,637,622.97	\$ 5,226,548.09	\$ 15,340,117.37
Line #25 (line #21)	\$ 3,842,173.50	\$ 4,573,910.63	\$ 4,107,947.74	\$ 12,524,031.87

FINANCIAL SUMMARY ATTACHMENT  
PERIOD OF 7-1-21 TO 6-30-22

LOCCS Reconciliation

Unexpended Balance of CDBG Funds 3,569,719.17

LOC Balance 4,766,125.45

    Cash on Hand

        Grantee Program Account (1,196,406.28)

        Subreipients

        Revolving Fund Cash Balances

        Section 108 Cash Balances

            Cash on Hand Total (1,196,406.28)

    Grantee CDBG Program Liabilities (include  
        any reimbursements due from program funds)

    Subrecipient CDBG Program Liabilities (include  
        any reimbursements due from program funds)

        Liabilities Total

Balance (provide an explanation if an unreconciled  
difference exists)

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**PART I: SUMMARY OF CDBG-CV RESOURCES**

01 CDBG-CV GRANT	7,100,119.00
02 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
03 FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
04 TOTAL AVAILABLE (SUM, LINES 01-03)	7,100,119.00

**PART II: SUMMARY OF CDBG-CV EXPENDITURES**

05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	4,375,433.82
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	427,715.38
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	4,803,149.20
09 UNEXPENDED BALANCE (LINE 04 - LINE8 )	2,296,969.80

**PART III: LOWMOD BENEFIT FOR THE CDBG-CV GRANT**

10 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
11 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	2,072,013.00
12 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	1,730,520.82
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	3,802,533.82
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	4,375,433.82
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	86.91%

**PART IV: PUBLIC SERVICE (PS) CALCULATIONS**

16 DISBURSED IN IDIS FOR PUBLIC SERVICES	2,303,420.82
17 CDBG-CV GRANT	7,100,119.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	32.44%

**PART V: PLANNING AND ADMINISTRATION (PA) CAP**

19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	427,715.38
20 CDBG-CV GRANT	7,100,119.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	6.02%

**LINE 10 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 10**

Report returned no data.

**LINE 11 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 11**

Plan Year	IDIS Project	IDIS Activity	Activity Name	matrix Code	National Objective	Drawn Amount
2021	1	6171	Taylor Ridge Apt Acquisition/Rehab-4759 NW 36-Mental Health Assoc.	14B	LMH	\$2,072,013.00
<b>Total</b>						<b>\$2,072,013.00</b>

**LINE 12 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 12**

Plan Year	IDIS Project	IDIS Activity	voucher Number	Activity Name	matrix Code	National Objective	Drawn Amount		
2020	1	5965	6405441	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$229,776.79		
			6409273	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$125,965.84		
			6424757	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$78,990.61		
			6433388	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$68,123.32		
			6443346	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$10,274.52		
			6450373	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$17,265.84		
			6467561	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$57,862.56		
			6477174	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$58,416.33		
			6491930	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$91,326.28		
			6499976	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$68,985.51		
			6517795	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$50,695.13		
			6520895	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$50,695.13		
			6526456	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$46,661.79		
			6564111	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$35,860.61		
			6576725	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$9,077.70		
			6651281	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$3,443.00		
			2	5979	6427174	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$24,000.00
					6443346	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$5,897.33
					6444861	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$3,800.00

	6467561	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$4,461.59
	6486955	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$840.94
	6510064	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$24,000.00
5980	6424757	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,630.82
	6430617	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,010.22
	6437239	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,754.24
	6443346	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$19,150.46
	6444861	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,197.86
	6454959	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,506.97
	6460287	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$824.71
	6467561	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$12,771.93
	6472572	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,994.20
	6477174	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,438.60
	6486955	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,718.45
	6499976	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$12,361.61
	6510064	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$2,139.93
6022	6443346	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$44,000.00
	6450373	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$5,725.25
	6460287	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$14,000.00
	6482485	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$3,939.25
	6503308	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$5,335.50
6023	6430617	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$22,684.00
	6433388	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$24,000.00
	6435277	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$67,083.51
	6443346	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$76,594.21
	6444861	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$15,078.43
	6452122	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$24,000.00
	6454959	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$49,358.00
	6460287	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$24,161.50
	6467561	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,282.72
	6472572	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,607.45
	6477174	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$32,640.15
	6482485	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$22,842.40
	6486955	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$39,418.22
	6491930	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$20,000.00
	6499976	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$19,703.16
	6510064	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$20,182.37
	6517795	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$10,822.71
	6523913	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,054.30
	6523916	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$7,728.68
	6526705	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,752.22
	6526706	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$7,728.68
	6538307	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,717.58
	6538308	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,383.04
	6564111	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,120.60
	6566546	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$535.46
	6576725	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,120.61
<b>Total</b>					<b>\$1,730,520.82</b>

**LINE 16 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 16**

Plan Year	IDIS Project	IDIS Activity	voucher Number	Activity Name	matrix Code	National Objective	Drawn Amount
2020	1	5965	6405441	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$229,776.79
			6409273	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$125,965.84
			6424757	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$78,990.61
			6433388	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$68,123.32
			6443346	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$10,274.52
			6450373	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$17,265.84
			6467561	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$57,862.56
			6477174	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$58,416.33
			6491930	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$91,326.28
			6499976	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$68,985.51
			6517795	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$50,695.13
			6520895	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$50,695.13
			6526456	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$46,661.79
			6564111	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$35,860.61

	6576725	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$9,077.70
	6651281	CV-CDBG CAA-Short Term Housing & Utility Assistance	05Q	LMC	\$3,443.00
5978	6424757	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$27,773.42
	6427174	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$10,000.00
	6430617	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$8,847.08
	6437239	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$28,451.58
	6443346	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$14,500.00
	6467561	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$1,850.00
	6477174	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$6,052.92
	6499976	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$44,000.00
	6517795	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$11,025.00
	6564111	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	05Z	URG	\$11,000.00
5979	6427174	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$24,000.00
	6443346	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$5,897.33
	6444861	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$3,800.00
	6467561	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$4,461.59
	6486955	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$840.94
	6510064	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$24,000.00
5980	6424757	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,630.82
	6430617	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,010.22
	6437239	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,754.24
	6443346	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$19,150.46
	6444861	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,197.86
	6454959	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,506.97
	6460287	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$824.71
	6467561	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$12,771.93
	6472572	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,994.20
	6477174	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,438.60
	6486955	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,718.45
	6499976	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$12,361.61
	6510064	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$2,139.93
6021	6430617	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$24,000.00
	6433388	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$54,000.00
	6435277	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$15,000.00
	6437239	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$55,476.48
	6443346	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$37,597.66
	6444861	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$8,964.90
	6450373	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$24,000.00
	6452122	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$6,320.82
	6454959	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$4,667.19
	6460287	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$20,000.00
	6467561	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$30,953.76
	6482485	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$33,812.50
	6491930	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$18,580.00
	6499976	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$13,541.95
	6510064	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$24,000.00
	6517795	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$5,341.15
	6520895	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$7,800.00
	6538307	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$1,218.32
	6576725	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$6,707.77
	6601780	CV-CDBG Non Profit Assistance-Urgent Need	05Z	URG	\$17,417.50
6022	6443346	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$44,000.00
	6450373	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$5,725.25
	6460287	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$14,000.00
	6482485	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$3,939.25
	6503308	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	05Z	LMA	\$5,335.50
6023	6430617	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$22,684.00
	6433388	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$24,000.00
	6435277	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$67,083.51
	6443346	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$76,594.21
	6444861	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$15,078.43
	6452122	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$24,000.00
	6454959	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$49,358.00
	6460287	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$24,161.50
	6467561	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$1,282.72
	6472572	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$3,607.45

6477174	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$32,640.15
6482485	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$22,842.40
6486955	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$39,418.22
6491930	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$20,000.00
6499976	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$19,703.16
6510064	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$20,182.37
6517795	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$10,822.71
6523913	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,054.30
6523916	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$7,728.68
6526705	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,752.22
6526706	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$7,728.68
6538307	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,717.58
6538308	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$5,383.04
6564111	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,120.60
6566546	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$535.46
6576725	CV-CDBG Non Profit Assistance-Low Mod Clientele	05Z	LMC	\$4,120.61

Total

**\$2,303,420.82**

**LINE 19 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 19**

Plan Year	IDIS Project	IDIS Activity	voucnr Number	Activity Name	matrix Code	National Objective	Drawn Amount
2020	2	6091	6491928	CV-CDBG Heartline	21A		\$37,509.08
			6564111	CV-CDBG Heartline	21A		\$3,511.29
			6566546	CV-CDBG Heartline	21A		\$4,714.93
			6601780	CV-CDBG Heartline	21A		\$4,464.70
	5	5971	6443346	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$5,270.00
			6450373	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$8,021.72
			6467561	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$5,159.82
			6477174	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$11,437.76
			6491930	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$5,242.24
			6499976	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$3,839.93
			6517795	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$4,529.63
			6520895	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$4,529.63
			6526456	CV-CDBG-CAA Short Term Housing & Utility Administration	21A		\$23,547.91
		5972	6392631	CV-CDBG ADMINISTRATION	21A		\$23,509.63
			6400249	CV-CDBG ADMINISTRATION	21A		\$1,653.44
			6400251	CV-CDBG ADMINISTRATION	21A		\$10,401.47
			6403447	CV-CDBG ADMINISTRATION	21A		\$5,799.10
			6405441	CV-CDBG ADMINISTRATION	21A		\$2,674.99
			6409273	CV-CDBG ADMINISTRATION	21A		\$4,957.11
			6413266	CV-CDBG ADMINISTRATION	21A		\$13,234.41
			6414721	CV-CDBG ADMINISTRATION	21A		\$5,733.38
			6421066	CV-CDBG ADMINISTRATION	21A		\$10,295.81
			6424757	CV-CDBG ADMINISTRATION	21A		\$11,143.39
			6428948	CV-CDBG ADMINISTRATION	21A		\$5,840.83
			6433386	CV-CDBG ADMINISTRATION	21A		\$5,733.53
			6433388	CV-CDBG ADMINISTRATION	21A		\$10,613.01
			6437224	CV-CDBG ADMINISTRATION	21A		\$5,840.93
			6450370	CV-CDBG ADMINISTRATION	21A		\$5,820.00
			6470477	CV-CDBG ADMINISTRATION	21A		\$10,445.76
			6477174	CV-CDBG ADMINISTRATION	21A		\$5,786.05
			6482485	CV-CDBG ADMINISTRATION	21A		\$7,649.79
			6491928	CV-CDBG ADMINISTRATION	21A		\$3,463.53
			6499966	CV-CDBG ADMINISTRATION	21A		\$5,493.42
			6503308	CV-CDBG ADMINISTRATION	21A		\$5,806.67
			6510061	CV-CDBG ADMINISTRATION	21A		\$5,699.19
			6517795	CV-CDBG ADMINISTRATION	21A		\$5,812.62
			6526705	CV-CDBG ADMINISTRATION	21A		\$10,104.27
			6526706	CV-CDBG ADMINISTRATION	21A		\$7,061.82
			6538304	CV-CDBG ADMINISTRATION	21A		\$9,089.28
			6548275	CV-CDBG ADMINISTRATION	21A		\$4,695.43
			6560521	CV-CDBG ADMINISTRATION	21A		\$13,689.45
			6566546	CV-CDBG ADMINISTRATION	21A		\$4,618.28
			6576728	CV-CDBG ADMINISTRATION	21A		\$13,843.27
			6601783	CV-CDBG ADMINISTRATION	21A		\$24,623.27
			6624120	CV-CDBG ADMINISTRATION	21A		\$19,152.76



6633025	CV-CDBG ADMINISTRATION	21A	\$4,821.64
6651279	CV-CDBG ADMINISTRATION	21A	\$14,119.11
6678204	CV-CDBG ADMINISTRATION	21A	\$6,346.11
6678210	CV-CDBG ADMINISTRATION	21A	\$363.99
			<hr/>
			<b>\$427,715.38</b>

**Total**

CDBG CV  
PR26 Adjustment Reconciliations  
PY 2021

Line	Amount	
11	\$ 2,072,013.00	Activity 6171 Not Reflected in Line 19 Detail: Activities Included in the Compuation of Line 11
Total Line	\$ 2,072,013.00	

Year	PID	Project Name	Activity to r	Activity Name	Address	Descriptor NatObj	PctLM	MTX	Status	Objectives	Outcomes	Fund Dt	Funded	Draw Thru Amount	Draw In Amount	Balance	Prior Year Draws	
2020	0001	CDBG-CV	5965	Yes	CV-CDBG CAA-Short Term Housing & Utility Assistance	319 SW 25th St Oklahoma City, OK 73109-5921		0 05Q	C	2	2	6/11/2020	0.00		0.00	\$ -	0.00	
2020	0001	CDBG-CV	5965	Yes	CV-CDBG CAA-Short Term Housing & Utility Assistance	319 SW 25th St Oklahoma City, OK 73109-5921		0 05Q	C	2	2	6/11/2020	1,003,420.96		1,003,420.96	\$ 48,381.31	0.00	
2020	0002	CDBG-CV	5978	Yes	CV-CDBG Allied Arts Non Profit Assistance-Urgent Need	420 W Main St Suite 940 Oklahoma City, OK 73102-4437		0 05Z	C	3	3	7/20/2020	163,500.00		163,500.00	\$ 11,000.00	0.00 \$ 24,000.00	
2020	0002	CDBG-CV	5979	Yes	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Area Benefit	420 W Main St Oklahoma City, OK 73102-4437		63.52 05Z	C	3	3	7/20/2020	62,999.86		62,999.86	\$ -	0.00	
2020	0002	CDBG-CV	5980	Yes	CV-CDBG Allied Arts Non Profit Assistance-Low Mod Clientele	420 W Main St Oklahoma City, OK 73102-4437		0 05Z	C	3	3	7/20/2020	73,500.00		73,500.00	\$ -	0.00 \$ 6,055.85	
2020	0002	CDBG-CV	6021	Yes	CV-CDBG Non Profit Assistance-Urgent Need	420 W Main St Oklahoma City, OK 73102-4437		0 05Z	C	3	3	10/13/2020	409,400.00		409,400.00	\$ 25,343.59	0.00 \$ (1,218.32)	
2020	0002	CDBG-CV	6022	Yes	CV-CDBG Non Profit Assistance-Low Mod Area Benefit	420 W Main St Oklahoma City, OK 73102-4437		67.52 05Z	C	3	3	10/13/2020	73,000.00		73,000.00	\$ -	0.00	
2020	0002	CDBG-CV	6023	Yes	CV-CDBG Non Profit Assistance-Low Mod Clientele	420 W Main St Oklahoma City, OK 73102-4437		0 05Z	C	3	3	10/13/2020	517,600.00		517,600.00	\$ 26,605.97	0.00	
2020	0002	CDBG-CV	6091	Yes	CV-CDBG Heartline	.		0 21A	C	0	0	5/20/2021	50,200.00		50,200.00	\$ 12,690.92	0.00	
2020	0005	CDBG-CV	5971	Yes	CV-CDBG-CAA Short Term Housing & Utility Administration	.		0 21A	C	0	0	6/24/2020	71,578.64		71,578.64	\$ -	0.00	
2020	0005	CDBG-CV	5972	Yes	CV-CDBG ADMINISTRATION	.		0 21A	O	0	0	6/24/2020	523,368.00		305,936.74	\$ 122,424.42	217,431.26	
2021	0001	Affordable	6171	Yes	Taylor Ridge Apt Acquisition/Rehab-4759 NW 36-Mental Health Assoc.	4759 NW 36th St Oklahoma City, OK 73122-2412		0 14B	O	2	2	3/8/2022	4,151,551.00		2,072,013.00	\$ 2,079,538.00		
															\$ 2,318,459.21		\$ 28,837.53	
															\$ 2,347,296.74			

Adjustments  
 Total CDBG CV Draws FY 21-22 \$ 2,347,296.74



OKLAHOMA CITY

Count of CDBG Activities with Disbursements by Activity Group & Matrix Code

Activity Group	Activity Category	Open Activities		Completed Count	Completed Activities		Program Year Count	Total Activities Disbursed
		Open Count	Disbursed		Disbursed	Disbursed		
Acquisition	Acquisition of Real Property (01)	1	\$0.00	0	\$0.00	1	\$0.00	
	Disposition (02)	0	\$0.00	3	\$1,125,158.11	3	\$1,125,158.11	
	<b>Total Acquisition</b>	<b>1</b>	<b>\$0.00</b>	<b>3</b>	<b>\$1,125,158.11</b>	<b>4</b>	<b>\$1,125,158.11</b>	
Economic Development	ED Direct Financial Assistance to For-	3	\$0.00	0	\$0.00	3	\$0.00	
	ED Technical Assistance (18B)	0	\$0.00	1	\$40,000.00	1	\$40,000.00	
	Micro-Enterprise Assistance (18C)	0	\$0.00	1	\$0.00	1	\$0.00	
	<b>Total Economic Development</b>	<b>3</b>	<b>\$0.00</b>	<b>2</b>	<b>\$40,000.00</b>	<b>5</b>	<b>\$40,000.00</b>	
Housing	Rehab; Single-Unit Residential (14A)	1	\$0.00	36	\$1,140,813.35	37	\$1,140,813.35	
	Rehab; Multi-Unit Residential (14B)	1	\$2,720,462.00	1	\$252,907.50	2	\$2,973,369.50	
	Public Housing Modernization (14C)	0	\$0.00	2	\$235,000.00	2	\$235,000.00	
	Rehabilitation Administration (14H)	0	\$0.00	2	\$492,493.02	2	\$492,493.02	
	Housing Services - Excluding Housing	1	\$0.00	0	\$0.00	1	\$0.00	
	<b>Total Housing</b>	<b>3</b>	<b>\$2,720,462.00</b>	<b>41</b>	<b>\$2,121,213.87</b>	<b>44</b>	<b>\$4,841,675.87</b>	
Public Facilities and Improvements	Homeless Facilities (not operating costs)	0	\$0.00	1	\$0.00	1	\$0.00	
	Neighborhood Facilities (03E)	2	\$52,325.00	3	\$3,200.00	5	\$55,525.00	
	Parks, Recreational Facilities (03F)	1	\$35,241.20	0	\$0.00	1	\$35,241.20	
	Street Improvements (03K)	1	\$202,287.23	0	\$0.00	1	\$202,287.23	
	Sidewalks (03L)	0	\$0.00	3	\$594,263.73	3	\$594,263.73	
	Tree Planting (03N)	0	\$0.00	2	\$5,568.20	2	\$5,568.20	
	Other Public Improvements Not Listed in	1	\$124,814.53	1	\$0.00	2	\$124,814.53	
	<b>Total Public Facilities and Improvements</b>	<b>5</b>	<b>\$414,667.96</b>	<b>10</b>	<b>\$603,031.93</b>	<b>15</b>	<b>\$1,017,699.89</b>	
Public Services	Legal Services (05C)	0	\$0.00	1	\$84,250.00	1	\$84,250.00	
	Youth Services (05D)	0	\$0.00	1	\$8,366.40	1	\$8,366.40	
	Subsistence Payment (05Q)	0	\$0.00	1	\$48,381.31	1	\$48,381.31	
	Other Public Services Not Listed in 05A-	1	\$100,637.08	11	\$548,845.04	12	\$649,482.12	
	<b>Total Public Services</b>	<b>1</b>	<b>\$100,637.08</b>	<b>14</b>	<b>\$689,842.75</b>	<b>15</b>	<b>\$790,479.83</b>	
General Administration and Planning	Planning (20)	0	\$0.00	2	\$48,959.30	2	\$48,959.30	
	General Program Administration (21A)	1	\$122,424.41	6	\$787,747.79	7	\$910,172.20	

	<b>Total General Administration and Planning</b>	<b>1</b>	<b>\$122,424.41</b>	<b>8</b>	<b>\$836,707.09</b>	<b>9</b>	<b>\$959,131.50</b>
Other	Interim Assistance (06)	0	\$0.00	2	\$183,898.97	2	\$183,898.97
	<b>Total Other</b>	<b>0</b>	<b>\$0.00</b>	<b>2</b>	<b>\$183,898.97</b>	<b>2</b>	<b>\$183,898.97</b>
Repayment of Section 108 Loans	Planned Repayment of Section 108 Loan	0	\$0.00	1	\$948,520.60	1	\$948,520.60
	<b>Total Repayment of Section 108 Loans</b>	<b>0</b>	<b>\$0.00</b>	<b>1</b>	<b>\$948,520.60</b>	<b>1</b>	<b>\$948,520.60</b>
<b>Grand Total</b>		<b>14</b>	<b>\$7,358,191.45</b>	<b>81</b>	<b>\$6,548,373.32</b>	<b>95</b>	<b>\$9,906,564.77</b>

**CDBG Sum of Actual Accomplishments by Activity Group and Accomplishment Type**

<b>Activity Group</b>	<b>Matrix Code</b>	<b>Accomplishment Type</b>	<b>Open Count</b>	<b>Completed Count</b>	<b>Program Year Totals</b>
Acquisition	Acquisition of Real Property (01)	Business	0	0	0
	Disposition (02)	Business	0	3	3
	<b>Total Acquisition</b>		<b>0</b>	<b>3</b>	<b>3</b>
Economic Development	ED Direct Financial Assistance to For-Profits (18A)	Jobs	278,540	0	278,540
	ED Technical Assistance (18B)	Business	0	64,630	64,630
	Micro-Enterprise Assistance (18C)	Persons	0	33	33
	<b>Total Economic Development</b>		<b>278,540</b>	<b>64,663</b>	<b>343,203</b>
Housing	Rehab; Single-Unit Residential (14A)	Housing Units	0	83	83
	Rehab; Multi-Unit Residential (14B)	Housing Units	0	52	52
	Public Housing Modernization (14C)	Housing Units	0	20	20
	Rehabilitation Administration (14H)	Housing Units	0	0	0
	Housing Services - Excluding Housing Counseling,	Housing Units	0	0	0
	<b>Total Housing</b>		<b>0</b>	<b>155</b>	<b>155</b>
Public Facilities and Improvements	Homeless Facilities (not operating costs) (03C)	Public Facilities	0	1,553	1,553
	Neighborhood Facilities (03E)	Public Facilities	356,900	4,460	361,360
	Parks, Recreational Facilities (03F)	Public Facilities	800	0	800
	Street Improvements (03K)	Persons	2,180	0	2,180
	Sidewalks (03L)	Persons	0	605	605
		Public Facilities	0	1,600	1,600
	Tree Planting (03N)	Public Facilities	0	16,560	16,560
	Other Public Improvements Not Listed in 03A-03S (03Z)	Housing Units	0	0	0
		Public Facilities	0	675	675
	<b>Total Public Facilities and Improvements</b>		<b>359,880</b>	<b>25,453</b>	<b>385,333</b>
Public Services	Legal Services (05C)	Persons	0	325	325
	Youth Services (05D)	Persons	0	95	95
	Subsistence Payment (05Q)	Persons	0	626	626
	Other Public Services Not Listed in 05A-05Y, 03T	Persons	44,239	321,749	365,988
	<b>Total Public Services</b>		<b>44,239</b>	<b>322,795</b>	<b>367,034</b>

Other	Interim Assistance (06)	Housing Units	0	7,853	7,853
	<b>Total Other</b>		<b>0</b>	<b>7,853</b>	<b>7,853</b>
<b>Grand Total</b>			<b>682,659</b>	<b>420,922</b>	<b>1,103,581</b>

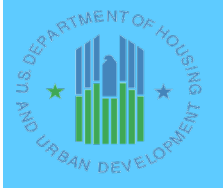
**CDBG Beneficiaries by Racial / Ethnic Category**

Housing-Non Housing	Race	Total Persons	Total Hispanic		
			Persons	Total Households	
			Total Hispanic	Total Hispanic	
			Persons	Households	
Housing	White	0	0	68	2
	Black/African American	0	0	71	0
	Asian	0	0	6	0
	American Indian/Alaskan Native	0	0	4	0
	Other multi-racial	0	0	7	7
	<b>Total Housing</b>		<b>0</b>	<b>0</b>	<b>156</b>
Non Housing	White	36,215	187	0	0
		2,630	320	0	0
	Black/African American	31,665	1	0	0
		1,637	20	0	0
	Asian	590	0	0	0
		62	0	0	0
	American Indian/Alaskan Native	3,749	1	0	0
		351	22	0	0
	Native Hawaiian/Other Pacific Islander	12	0	0	0
		25	4	0	0
	American Indian/Alaskan Native & White	1	0	0	0
	Black/African American & White	904	0	0	0
		3	0	0	0
	Amer. Indian/Alaskan Native & Black/African Amer.	2,542	0	0	0
	Amer.	5	1	0	0
Other multi-racial	7,291	4,910	0	0	
	435	52	0	0	
<b>Total Non Housing</b>		<b>88,117</b>	<b>5,518</b>	<b>0</b>	<b>0</b>
Grand Total	White	36,215	187	68	2
		2,630	320	0	0
	Black/African American	31,665	1	71	0
		1,637	20	0	0
	Asian	590	0	6	0
		62	0	0	0
	American Indian/Alaskan Native	3,749	1	4	0
		351	22	0	0
	Native Hawaiian/Other Pacific Islander	12	0	0	0
		25	4	0	0

American Indian/Alaskan Native & White	1	0	0	0
Black/African American & White	904	0	0	0
	3	0	0	0
Amer. Indian/Alaskan Native & Black/African Amer.	2,542	0	0	0
Amer.	5	1	0	0
Other multi-racial	7,291	4,910	7	7
	435	52	0	0
<b>Total Grand Total</b>	<b>88,117</b>	<b>5,518</b>	<b>156</b>	<b>9</b>

**CDBG Beneficiaries by Income Category**

	<b>Income Levels</b>	<b>Owner Occupied</b>	<b>Renter Occupied</b>	<b>Persons</b>
Housing	Extremely Low (<=30%)	37	0	0
	Low (>30% and <=50%)	26	0	0
	Mod (>50% and <=80%)	16	0	0
	Total Low-Mod	79	0	0
	Non Low-Mod (>80%)	0	0	0
	Total Beneficiaries	79	0	0
Non Housing	Extremely Low (<=30%)	0	0	45,031
	Low (>30% and <=50%)	0	0	39
	Mod (>50% and <=80%)	0	0	12
	Total Low-Mod	0	0	45,082
	Non Low-Mod (>80%)	0	0	10
	Total Beneficiaries	0	0	45,092



Program Year: 2021  
 Start Date 01-Jul-2021 - End Date 30-Jun-2022

**OKLAHOMA CITY**  
**Home Disbursements and Unit Completions**

Activity Type	Disbursed Amount	Units Completed	Units Occupied
First Time Homebuyers	\$466,836.36	11	11
Existing Homeowners	\$392,596.00	9	9
Total, Homebuyers and Homeowners	\$859,432.36	20	20
<b>Grand Total</b>	<b>\$859,432.36</b>	<b>20</b>	<b>20</b>

**Home Unit Completions by Percent of Area Median Income**

Activity Type	Units Completed				
	31% - 50%	51% - 60%	61% - 80%	Total 0% - 60%	Total 0% - 80%
First Time Homebuyers	0	0	11	0	11
Existing Homeowners	7	2	0	9	9
Total, Homebuyers and Homeowners	7	2	11	9	20
<b>Grand Total</b>	<b>7</b>	<b>2</b>	<b>11</b>	<b>9</b>	<b>20</b>

**Home Unit Reported As Vacant**

Activity Type	Reported as Vacant
First Time Homebuyers	0
Existing Homeowners	0
Total, Homebuyers and	0
<b>Grand Total</b>	<b>0</b>

**Home Unit Completions by Racial / Ethnic Category**

	First Time Homebuyers		Existing Homeowners	
	Completed	Completed -	Completed	Completed -
White	7	4	2	1
Black/African American	3	0	7	0
Other multi-racial	1	0	0	0
<b>Total</b>	<b>11</b>	<b>4</b>	<b>9</b>	<b>1</b>



	Homeowners		Grand Total	
	Completed	Completed -	Completed	Completed -
White	9	5	9	5
Black/African American	10	0	10	0
Other multi-racial	1	0	1	0
<b>Total</b>	<b>20</b>	<b>5</b>	<b>20</b>	<b>5</b>

# 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: <b>HOME Program, Rm 7176, 451 7th Street, S.W., Washington D.C. 20410</b>	Starting 07/01/2021	Ending 06/30/2022	

## Part I Participant Identification

1. Participant Number	2. Participant Name City of Oklahoma City Planning Department		
3. Name of Person completing this report Chris Varga		4. Phone Number (Include Area Code) 405-297-1639	
5. Address 420 W. Main #920	6. City Oklahoma City	7. State OK	8. Zip Code 73102

## 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 136982.14	2. Amount received during Reporting Period 215094.18	3. Total amount expended during Reporting Period 198141.50	4. Amount expended for Tenant-Based Rental Assistance 0.00	5. Balance on hand at end of Reporting Period (1 + 2 - 3) = 5 153934.82
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## 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	
A. Contracts					
1. Number	6			2	4
2. Dollar Amount	274802.00			82214.00	192588.00
B. Sub-Contracts					
1. Number	2				2
2. Dollar Amount	325268.12				325268.12
	a. Total	b. Women Business Enterprises (WBE)	c. Male		
C. Contracts					
1. Number	6	2	4		
2. Dollar Amount	274802.00	82214.00	192588.00		
D. Sub-Contracts					
1. Number	2	0	2		
2. Dollar Amounts	325268.12	0.00	325268.12		

**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	0					
2. Dollar Amount	0.00					

**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	0	0.00
2. Businesses Displaced	0	0.00
3. Nonprofit Organizations Displaced	0	0.00
4. Households Temporarily Relocated, not Displaced	0	0.00

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	0					
6. Households Displaced - Cost	0.00					

PR07 - Drawdown Report by Voucher Number - Vouchers Submitted to Loccs

Voucher Number	Line Item	IDIS Project ID	IDIS Act ID	Voucher Created	Voucher Status	Status Date	LOCCS Send Date	Grant Number	CARES Act	Grant Year	Fund Type	Recipient TIN	Payee TIN	Program	PY	Metrics	Drawn Amount	
6503293	2	18	6005	6/7/2021	Cancelled	06/09/2021	6/8/2021	M20MC400203	PA	2020	PA	736005359	736005359	HOME			\$7,900.00	Cancelled PI Draw 8-8-22, returned back to PI remaining balance
6517655	1	9	6095	7/14/2021	Completed	07/20/2021	7/20/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$80.00	
6520903	1	9	6087	7/22/2021	Completed	07/27/2021	7/27/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$26,077.50	
6549722	2	9	6087	10/4/2021	Completed	10/05/2021	10/5/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$3,010.00	Year End Balance 6-30-21 \$ 136,982.14
6560477	1	9	6095	11/1/2021	Completed	11/02/2021	11/2/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$14,531.70	
6576677	1	2	6126	12/16/2021	Completed	12/21/2021	12/21/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$88.00	PI Received 7-1-21 to 6-30-22 \$ 207,194.18
6576677	2	2	6142	12/16/2021	Completed	12/21/2021	12/21/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$96.00	CXL Voucher #6503293, returned back to PI \$ 7,900.00
6578516	1	9	6095	12/21/2021	Completed	12/22/2021	12/22/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$19,364.30	Total Amount Received FY 21-22 \$ 215,094.18
6578602	1	9	6095	12/21/2021	Completed	12/22/2021	12/22/2021	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$113.00	
6601846	1	2	6142	2/25/2022	Completed	03/01/2022	3/1/2022	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$27,765.00	Minus PI Draws 7-1-21 to 6-30-22 \$ (198,141.50)
6606873	1	2	6160	3/10/2022	Completed	03/11/2022	3/11/2022	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$88.00	
6606873	2	2	6126	3/10/2022	Completed	03/11/2022	3/11/2022	M20MC400203	PI	2020	PI	736005359	736005359	HOME			\$2,404.04	Balance on Hand as of 6-30-22 \$ 153,934.82
6606873	3	2	6126	3/10/2022	Completed	03/11/2022	3/11/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$25,024.21	
6614791	1	2	6126	3/30/2022	Completed	03/30/2022	3/30/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$1,437.75	
6630387	1	2	6160	5/6/2022	Completed	05/10/2022	5/10/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$625.00	
6630387	2	2	6142	5/6/2022	Completed	05/10/2022	5/10/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$2,829.00	
6639102	1	2	6142	5/31/2022	Completed	05/31/2022	5/31/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$25,833.00	
6641980	1	2	6160	6/7/2022	Completed	06/07/2022	6/7/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$2,413.75	
6641988	1	2	6184	6/7/2022	Completed	06/07/2022	6/7/2022	M20MC400203	HP	2020	HP	736005359	736005359	HOME			\$180.00	
6641989	1	2	6160	6/7/2022	Completed	06/07/2022	6/7/2022	M20MC400203	HP	2020	HP	736005359	736005359	HOME			\$17,216.25	
6651922	1	2	6160	6/29/2022	Completed	06/29/2022	6/29/2022	M20MC400203	HP	2020	HP	736005359	736005359	HOME			\$518.28	
6651922	2	2	6160	6/29/2022	Completed	06/29/2022	6/29/2022	M21MC400203	HP	2021	HP	736005359	736005359	HOME			\$21,775.17	
6651922	3	2	6160	6/29/2022	Completed	06/29/2022	6/29/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$6,671.55	
<b>TOTAL DRAWS:</b>																	<b>\$198,141.50</b>	<b>Total Program Income Draws</b>

FY 22-23 Program Income

6658498	1	2	6184	7/18/2022	Completed	07/26/2022	7/26/2022	M21MC400203	PI	2021	PI	736005359	736005359	HOME			\$15,895.00	FY 22-23	
OKLAHOMA CITY, OK									HOME	HP	HUD	MC				\$17,036.25	\$0.00	\$0.00	<a href="#">Add-Edit   View</a>
OKLAHOMA CITY, OK									HOME	IU	HUD	MC			\$0.00	\$0.00	\$0.00	<a href="#">View</a>	
OKLAHOMA CITY, OK									HOME	PA	HUD	MC			\$16,313.82	\$0.00	\$0.00	<a href="#">Add-Edit   View</a>	
OKLAHOMA CITY, OK									HOME	PI	HUD	MC			\$104,689.75	\$0.00	\$0.00	<a href="#">Add-Edit   View</a>	

\$ 17,036.25 HP Remaining  
 \$ 16,313.82 PA Remaining  
 \$ 104,689.75 PI Remaining  
 \$ 15,895.00 PI Drawn FY 22-23  
**\$ 153,934.82 Total Starting Balance 7-1-22**

oper stmt 72

Fund	Oper Unit	Dept	PC Bus U	Project	Activity	Program	Account	Year	Period	Date	Journal ID	Line #	Source	Amount
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750085	2022	1	7/26/2021	CAS19547	20	CAS	-12721.97
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750047	2022	2	8/3/2021	CAS19573	8	CAS	-3741.65
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750070	2022	2	8/5/2021	CAS19582	7	CAS	-5481.36
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	2	8/9/2021	CAS19590	18	CAS	-1400.73
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750070	2022	2	8/19/2021	CAS19623	14	CAS	-194.62
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750103	2022	3	9/2/2021	CAS19662	13	CAS	-35278.12
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	3	9/7/2021	CAS19670	17	CAS	-193.82
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	3	9/15/2021	CAS19695	20	CAS	-220.00
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	4	10/11/2021	CAS19771	16	CAS	-1002.33
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750047	2022	4	10/13/2021	CAS19780	6	CAS	-3587.25
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	5	11/22/2021	CAS19886	24	CAS	-592.22
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750089	2022	6	12/3/2021	CAS19911	18	CAS	-68.47
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750089	2022	6	12/3/2021	CAS19965	7	CAS	68.47
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	6	12/15/2021	CAS19932	27	CAS	-704.22
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750070	2022	7	1/11/2022	CAS19976	19	CAS	-4295.33
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	7	1/21/2022	CAS19995	11	CAS	-6590.60
019	6140	2408030	GR240	G80379	GRANTS	G9999	41105116	2022	8	2/25/2022	CAS20063	10	CAS	-2118.67
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750047	2022	8	2/25/2022	CAS20063	12	CAS	-662.04
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750101	2022	8	2/25/2022	CAS20063	8	CAS	-4881.33
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	9	3/2/2022	CAS20071	14	CAS	-830.11
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	9	3/29/2022	CAS20121	47	CAS	-891.96
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750085	2022	10	4/8/2022	CAS20144	27	CAS	-4350.00
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750070	2022	10	4/13/2022	CAS20153	16	CAS	-3812.92
019	6140	2408030	GR240	G80379	GRANTS	G9999	41105104	2022	10	4/14/2022	CAS20156	1	CAS	-49094.93
019	6140	2408030	GR240	G80379	GRANTS	G9999	41105104	2022	10	4/14/2022	CAS20157	1	CAS	-29916.08
019	6140	2408030	GR240	G80379	GRANTS	G9999	41105105	2022	10	4/14/2022	CAS20156	3	CAS	-3803.35
019	6140	2408030	GR240	G80379	GRANTS	G9999	41105105	2022	10	4/14/2022	CAS20157	3	CAS	-2317.58
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	10	4/15/2022	CAS20160	17	CAS	-928.22
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	11	5/18/2022	CAS20224	13	CAS	-704.22
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750021	2022	12	6/8/2022	CAS20262	16	CAS	-9289.29
019	6140	2408030	GR240	G80379	GRANTS	G9999	42750103	2022	12	6/24/2022	CAS20294	30	CAS	-17589.26

**-207194.18**

**HOME Completions FY 22-23**

HOME	IDIS #	Loan #	Address	Date Completed IDIS	HRTS Status	IDIS Status	Contractor	Sex	Race	HOME Funds FY 19-20	HOME Funds FY 20-21	HOME Funds FY 21-22	Total HOME	CDBG Funds	Total Project
1	5970	2570	9108 Pine St	10/1/2021	Completed 10-23-20	Completed	Traylee & L Construction	Female	Black	\$ 80.00	\$ 48,045.00	\$ -	\$ 48,125.00	\$ 75.00	\$ 48,200.00
2	6087	4313	836 NE 26	10/14/2021	Completed 8-19-21	Completed	Maverick	Male	White		\$ 80.00	\$ 57,711.00	\$ 57,791.00	\$ 75.00	\$ 57,866.00
3	6095	4341 & 4835	905 NE 29	1/3/2022	Completed 11-17-21	Completed	Traylee & L	Female	Black			\$ 34,089.00	\$ 34,089.00	\$ 100.00	\$ 34,189.00
4	6126	4643	1309 SW 12	5/23/2022	Completed 2-1-22	Completed	Maverick	Male	White			\$ 28,966.00	\$ 28,966.00	\$ 75.00	\$ 29,041.00
5	6142	4770	13 Allenhurst	6/6/2022	Completed 3-8-22	Completed	Maverick	Male	White			\$ 56,523.00	\$ 56,523.00	\$ 75.00	\$ 56,598.00
6	6160	4669	1108 NE 7	7/1/2022	Completed 5-9-22	Completed	Maverick	Male	White			\$ 49,308.00	\$ 49,308.00	\$ 75.00	\$ 49,383.00
										\$ 80.00	\$ 48,125.00	\$ 226,597.00	\$ 274,802.00	\$ 475.00	\$ 275,277.00

**CHDO COMPLETIONS FY 21-22**

<b>CHDO</b>	<b>IDIS #</b>	<b>Address</b>	<b>Agency</b>	<b>IDIS Status</b>	<b>IDIS Completion Date</b>	<b>IDIS Funded Amount</b>	
1	5930	1621 NE Euclid	JP	Completed	8/16/2021	\$ 163,399.66	JPNA President David Bigham
2	5931	1625 NE Euclid	JP	Completed	8/16/2021	\$ 161,868.46	JPNA President David Bigham
<b>Total</b>						<b>\$325,268.12</b>	



**User:** B62445  
**Role:** Grantee  
**Organization:** OKLAHOMA CITY  
  
- Logout

Plans/Projects/Activities | **Funding/Drawdown** | Grant <sup>1</sup> | Grantee/PJ | Reports

You have 1 CDBG activities that have been flagged. Click on the number to go to the review page.

**Activity Funding**  
- Search

**Drawdown**  
**View Voucher Line Item**

**Drawdown**  
- Create Voucher  
- **Search Voucher**  
- Search Collections  
- Approve Voucher

[Return to Search Vouchers](#) | [Return to View Voucher](#)

**Voucher Created For:** OKLAHOMA CITY, OK  
**IDIS Voucher # / Line Item #:** 6503293/2  
**Grant #:**  
**Transaction Type:** Payment

**Activity Owner:** OKLAHOMA CITY, OK  
**Created By:** B62445  
**Approved By:** C03912  
**Pay To:** OKLAHOMA CITY, OK

**Creation Date:** 06/07/2021  
**Approval Date:** 06/07/2021

**Receipt**  
- Add  
- Search  
- Search Accounts

**Section 108 Loan**  
- Search

**IDIS Information**  
**IDIS Status:** Voucher canceled after approval but before being sent to LOCCS  
**Batch #:**  
**Batch Date:**  
**LOCCS Control #:**  
**LOCCS Status:** Completed

**LOCCS Confirmation Information**  
**Confirm Batch #:** 3092  
**Confirm Batch Date:** 06/09/2021  
**Confirmation Code:** Ok  
**Pay Method:**  
**Payment Date:** 06/08/2021  
**Schedule #:**  
**Reschedule:** N  
**Effective Date:**

**Utilities**  
- Home  
- Data Downloads  
- Print Page  
- Help

**Voucher Update**  
**Voucher Updated By:** B62445  
**Date Updated:** 08/08/2022

**Links**  
- Contact Support  
- Rules of Behavior  
- CPD Home  
- HUD Home

**Line Item**

IDIS Actv ID	Activity Name	Program	Program Year of Receipt	Fund Type	Source Name	Source Type	Recipient Name	Prior Program Year	Drawdown Amount	Line Item Status	Submission Date
6005	HOME ADMINISTRATION-2020	HOME	2020	PA	HUD	MC	OKLAHOMA CITY, OK	N/A	\$7,900.00	Canceled	06/08/2021

[Return to Search Vouchers](#) | [Return to View Voucher](#)



**SECTION 108 PAYMENTS THRU 6-30-2022**

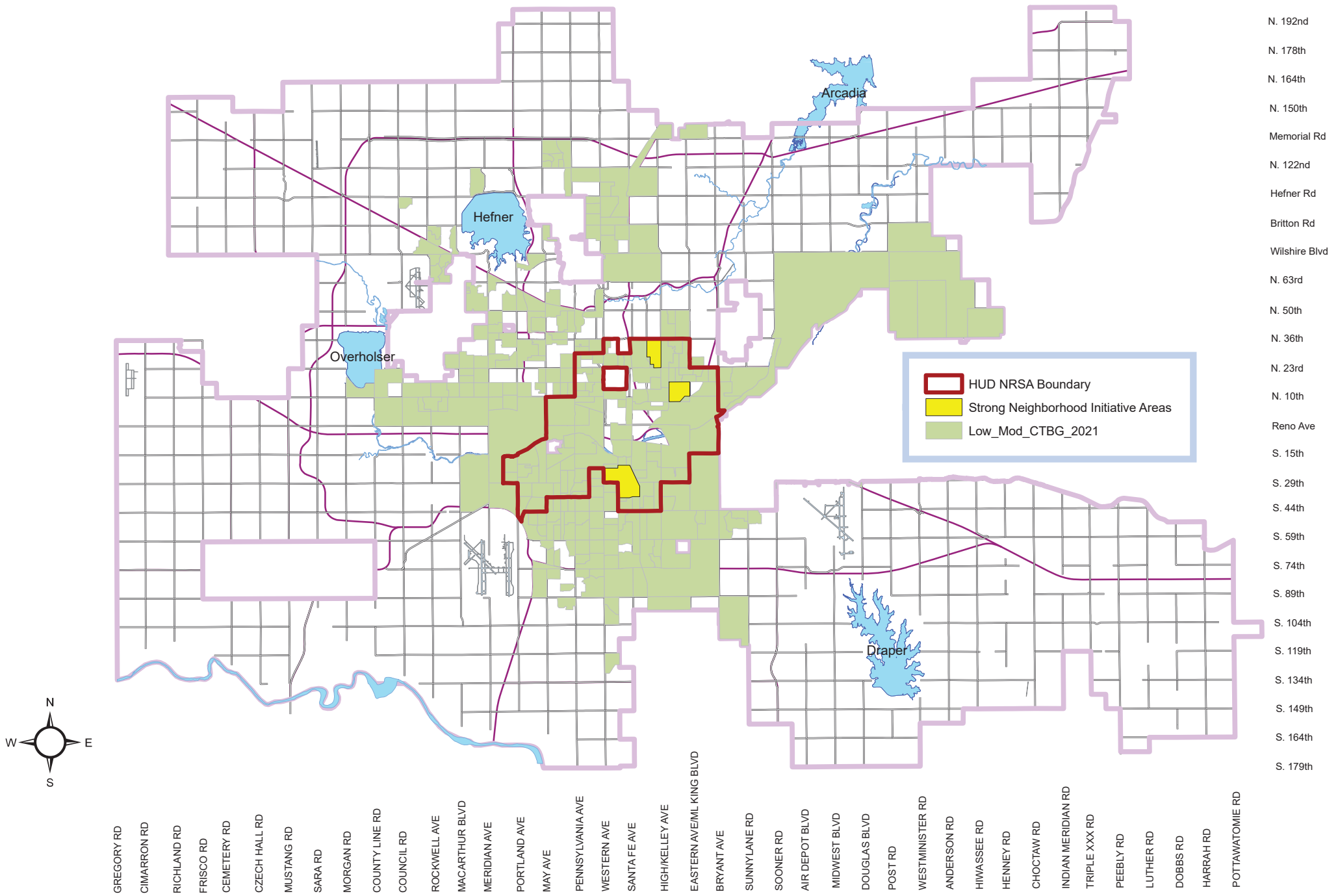
		FY 21-22	Total to Date	INFORMATION BASED ON TOTAL TO DATE EXPENDITURES
REVOLVING LOAN FUND	INTEREST	1,452.29	966,879.95	387,000.00 Paid by EDI and 466,420.98 Paid by Loan Repayments
	PRINCIPAL	1,675,000.00	4,300,000.00	Paid by Loan Repayment, Loan Fully Paid 5-6-21
21C Museum and Hotel	INTEREST	25,728.67	596,098.91	Paid by the Loan Recipient
21C Museum and Hotel	PRINCIPAL	342,000.00	1,666,000.00	Paid by the Loan Recipient
First National	INTEREST	7,455.65	7,455.65	Paid by the Loan Recipient
First National	PRINCIPAL	-	-	Paid by the Loan Recipient

Fund	Oper Unit	Dept	PC Bus U	Project	Activity	Program	Account	Year	Period	Date	Journal ID	Line #	Source	AP Bus U	Voucher	Line	Requester	Supplier	Vendor N	PO No.	Line	Date	Invoice	Amount	
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9247	52220025	2022	10	4/8/2022	APVP0145	28	AP	OKCOP	00501755	1	KIMBERLY00000766	Bank of Ne	00001493		1	4/5/2022	S108FNC05012022	7455.65	Interest
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9247	52220028	2022	10	4/8/2022	APVP0145	30	AP	OKCOP	00501755	2	KIMBERLY00000766	Bank of Ne	00001493		2	4/5/2022	S108FNC05012022	50.00	Fiscal Fees
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9261	52220022	2022	1	7/12/2021	APVP9509	14	AP	OKCOP	00485548	1	KIMBERLY00000766	Bank of Ne	00001454		3	5/6/2021	S108RLF08012021 FY 22	1675000.00	Principal
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9261	52220025	2022	1	7/12/2021	APVP9509	16	AP	OKCOP	00485548	2	KIMBERLY00000766	Bank of Ne	00001454		4	5/6/2021	S108RLF08012021 FY 22	1452.59	Interest
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9261	52220028	2022	1	7/12/2021	APVP9509	17	AP	OKCOP	00485545	3	KIMBERLY00000766	Bank of Ne	00001454		5	7/6/2021	S10821C08012021	100.00	Fiscal Fees
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52220022	2022	1	7/12/2021	APVP9509	15	AP	OKCOP	00485545	2	KIMBERLY00000766	Bank of Ne	00001454		2	7/6/2021	S10821C08012021	342000.00	Principal
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52220025	2022	7	1/5/2022	APVP9966	18	AP	OKCOP	00496728	1	KIMBERLY00000766	Bank of Ne	00001475		1	1/4/2022	S10821C02012022	5884.91	Interest
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52220025	2022	10	4/8/2022	APVP0145	29	AP	OKCOP	00501754	1	KIMBERLY00000766	Bank of Ne	00001475		1	4/5/2022	S10821C05012022	8526.84	Interest
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52220028	2022	4	10/5/2021	APVP9753	69	AP	OKCOP	00491370	2	KIMBERLY00000766	Bank of Ne	00001463		2	10/1/2021	S10821C11012021	100.00	Fiscal Fees
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52220028	2022	7	1/5/2022	APVP9966	19	AP	OKCOP	00496728	2	KIMBERLY00000766	Bank of Ne	00001475		2	1/4/2022	S10821C02012022	100.00	Fiscal Fees
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52220028	2022	10	4/8/2022	APVP0145	31	AP	OKCOP	00501754	2	KIMBERLY00000766	Bank of Ne	00001475		2	4/5/2022	S10821C05012022	50.00	Fiscal Fees
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52550025	2022	1	7/12/2021	APVP9509	18	AP	OKCOP	00485545	1	KIMBERLY00000766	Bank of Ne	00001454		1	7/6/2021	S10821C08012021	5718.25	Interest
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9276	52550025	2022	4	10/5/2021	APVP9753	71	AP	OKCOP	00491370	1	KIMBERLY00000766	Bank of Ne	00001463		1	10/1/2021	S10821C11012021	5598.67	Interest
019	6999	2409900	GRANT	G8SEC10	GRANTS	G9277	52550154	2022	10	4/8/2022	APVP0145	32	AP	OKCOP	00501732	1	KIMBERLY00002514	NE CS FN	00001493		1	3/10/2022	Draw 1	10992494.35	FNC Draw

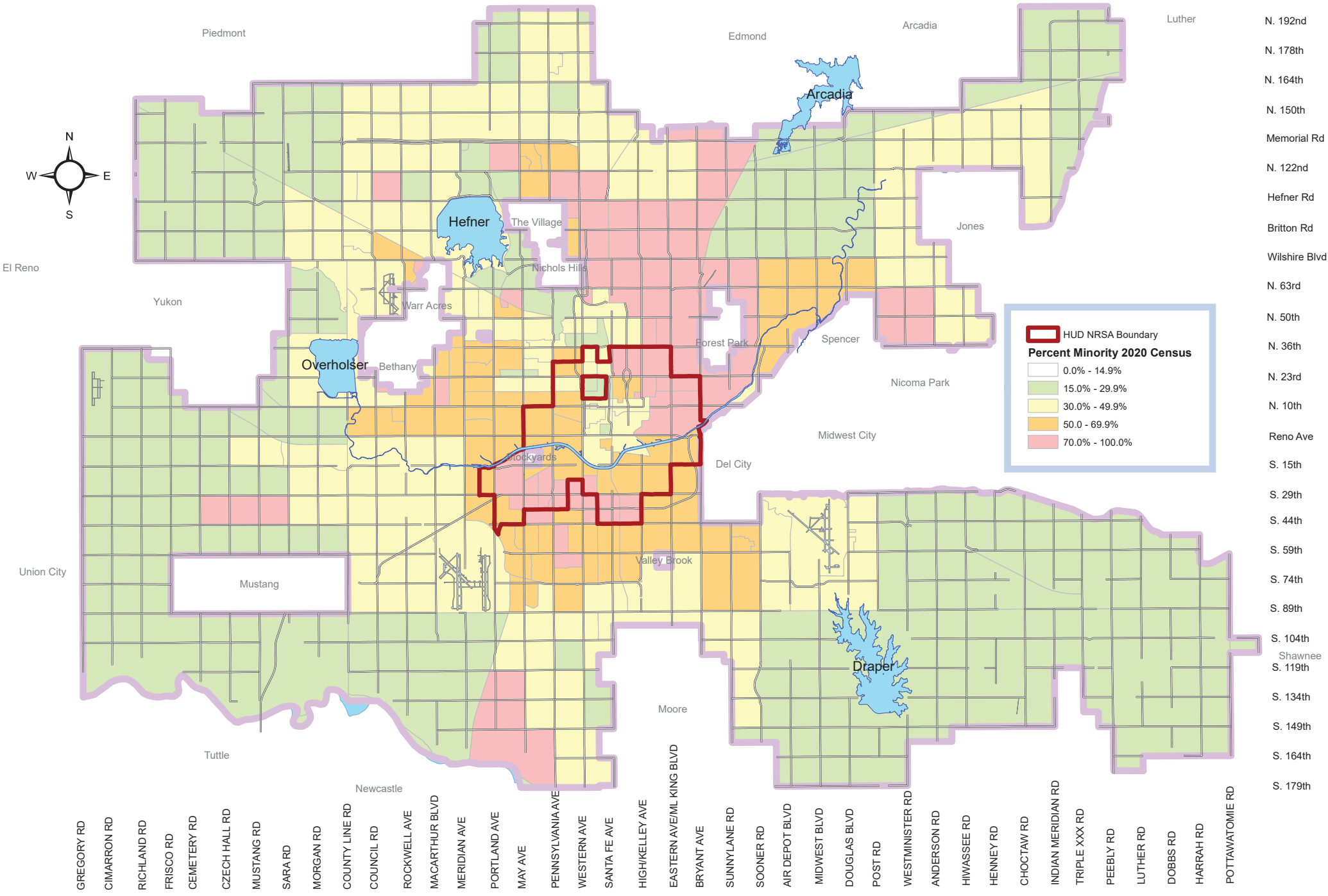
# APPENDIX 4

## MAPS

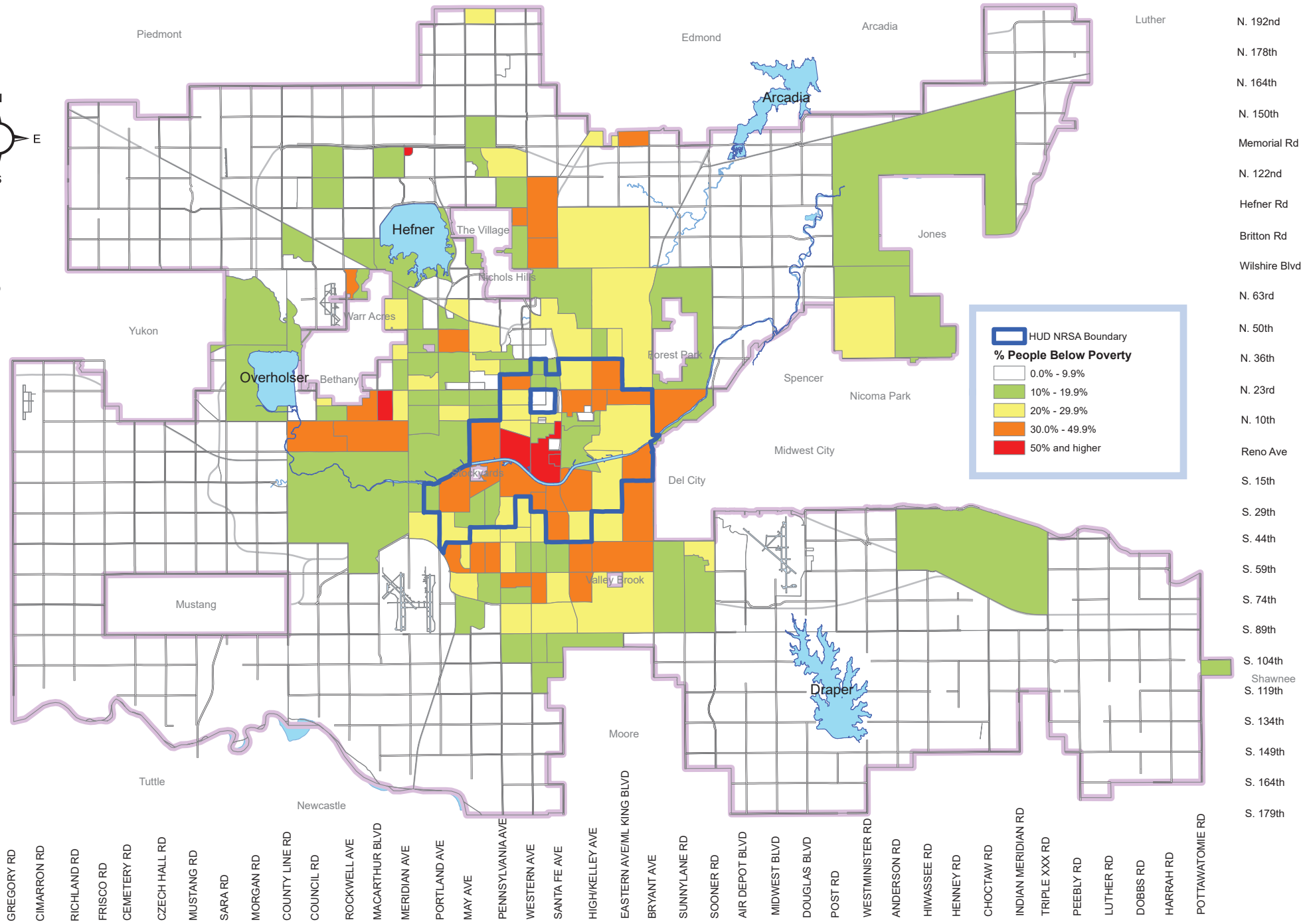
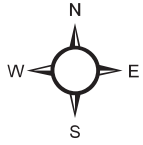
# Low and Moderate Income Areas 2021



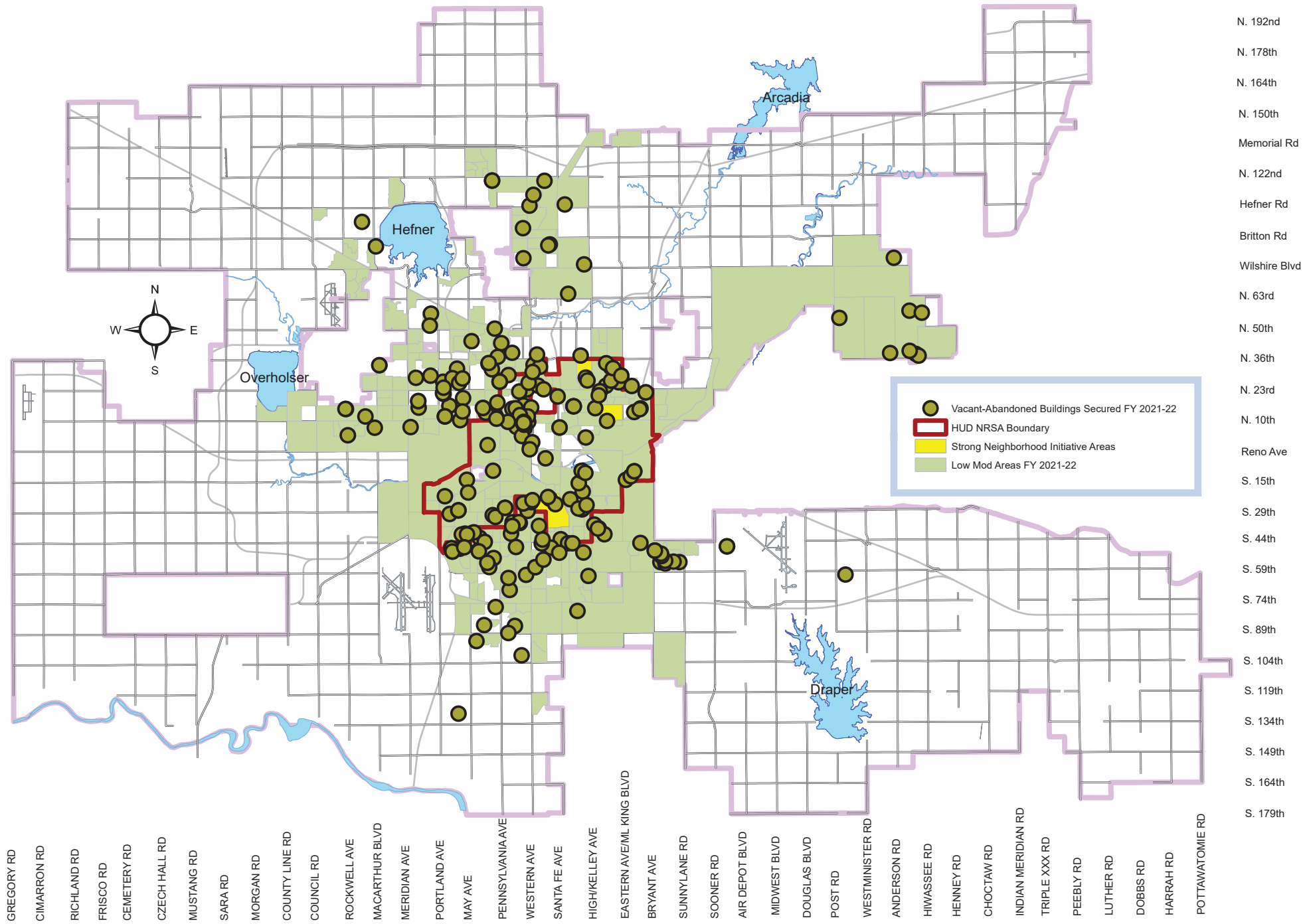
# Minority Population Census 2020



# Percent Below Poverty, 2020 ACS



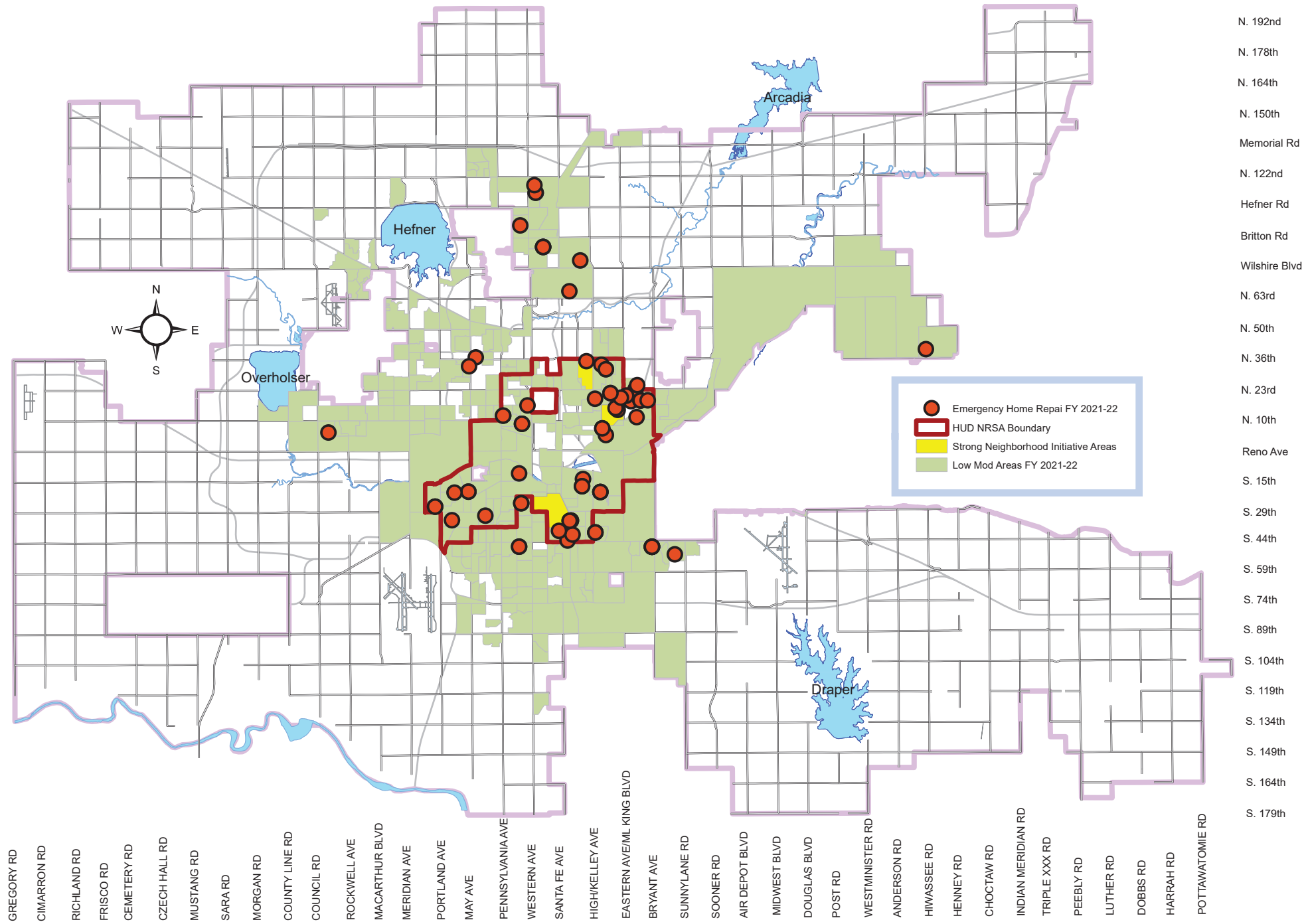
# Vacant and Abandoned Building Secured FY 2021-22



GREGORY RD  
 CIMARRON RD  
 RICHLAND RD  
 FRISCO RD  
 CEMETERY RD  
 CZECH HALL RD  
 MUSTANG RD  
 SARA RD  
 MORGAN RD  
 COUNTY LINE RD  
 COUNCIL RD  
 ROCKWELL AVE  
 MACARTHUR BLVD  
 MERIDIAN AVE  
 PORTLAND AVE  
 MAY AVE  
 PENNSYLVANIA AVE  
 WESTERN AVE  
 SANTA FE AVE  
 HIGHKELLEY AVE  
 EASTERN AVE/MIL KING BLVD  
 BRYANT AVE  
 SUNNYLANE RD  
 SOONER RD  
 AIR DEPOT BLVD  
 MIDWEST BLVD  
 DOUGLAS BLVD  
 POST RD  
 WESTMINSTER RD  
 ANDERSON RD  
 HIWASSEE RD  
 HENNEY RD  
 CHOCTAW RD  
 INDIAN MERIDIAN RD  
 TRIPLE XXX RD  
 PEEBLY RD  
 LUTHER RD  
 DOBBS RD  
 HARRAH RD  
 POTTAWATOMIE RD

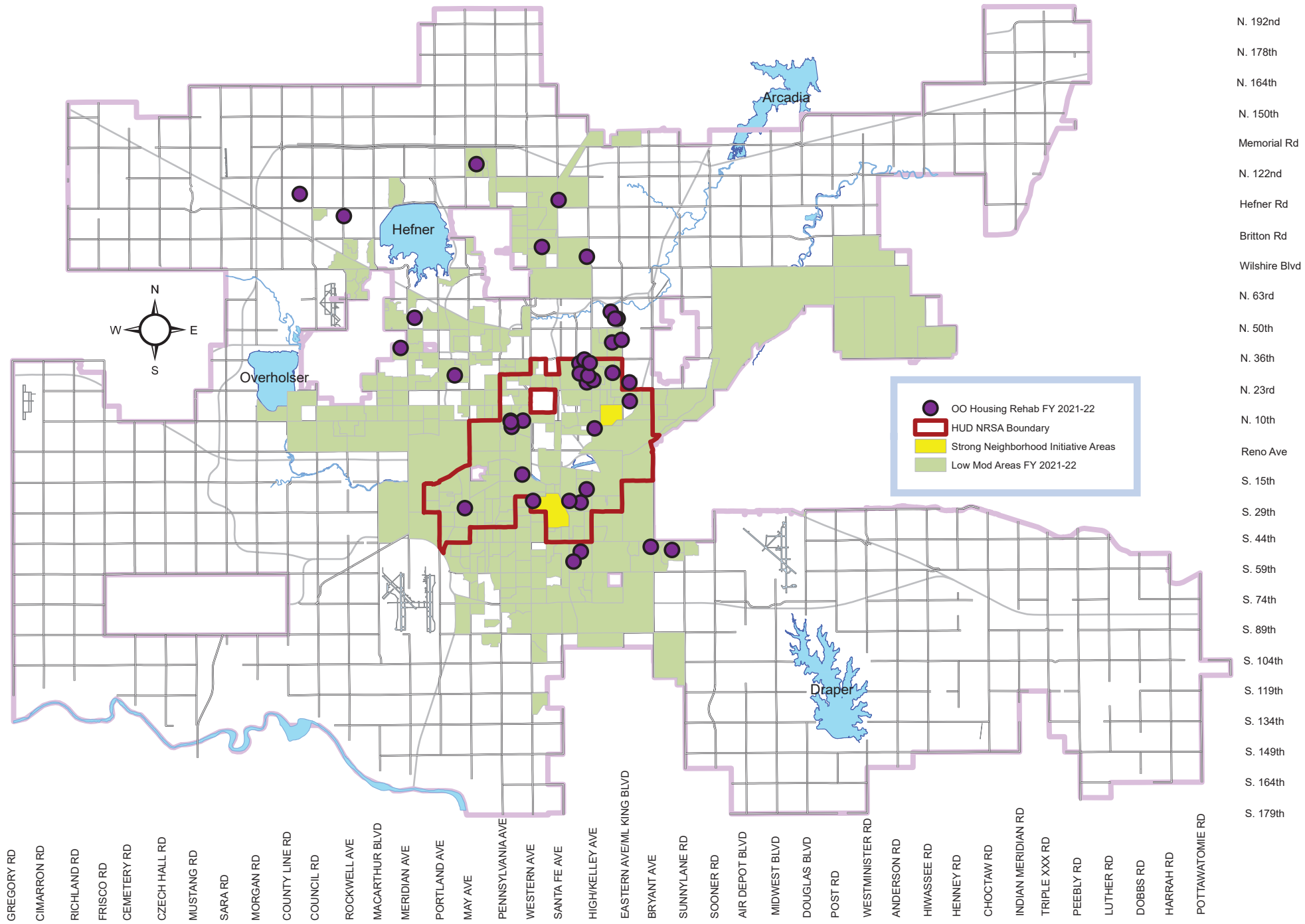
N. 192nd  
 N. 178th  
 N. 164th  
 N. 150th  
 Memorial Rd  
 N. 122nd  
 Hefner Rd  
 Britton Rd  
 Wilshire Blvd  
 N. 63rd  
 N. 50th  
 N. 36th  
 N. 23rd  
 N. 10th  
 Reno Ave  
 S. 15th  
 S. 29th  
 S. 44th  
 S. 59th  
 S. 74th  
 S. 89th  
 S. 104th  
 S. 119th  
 S. 134th  
 S. 149th  
 S. 164th  
 S. 179th

# Emergency Home Repair FY 2021-22

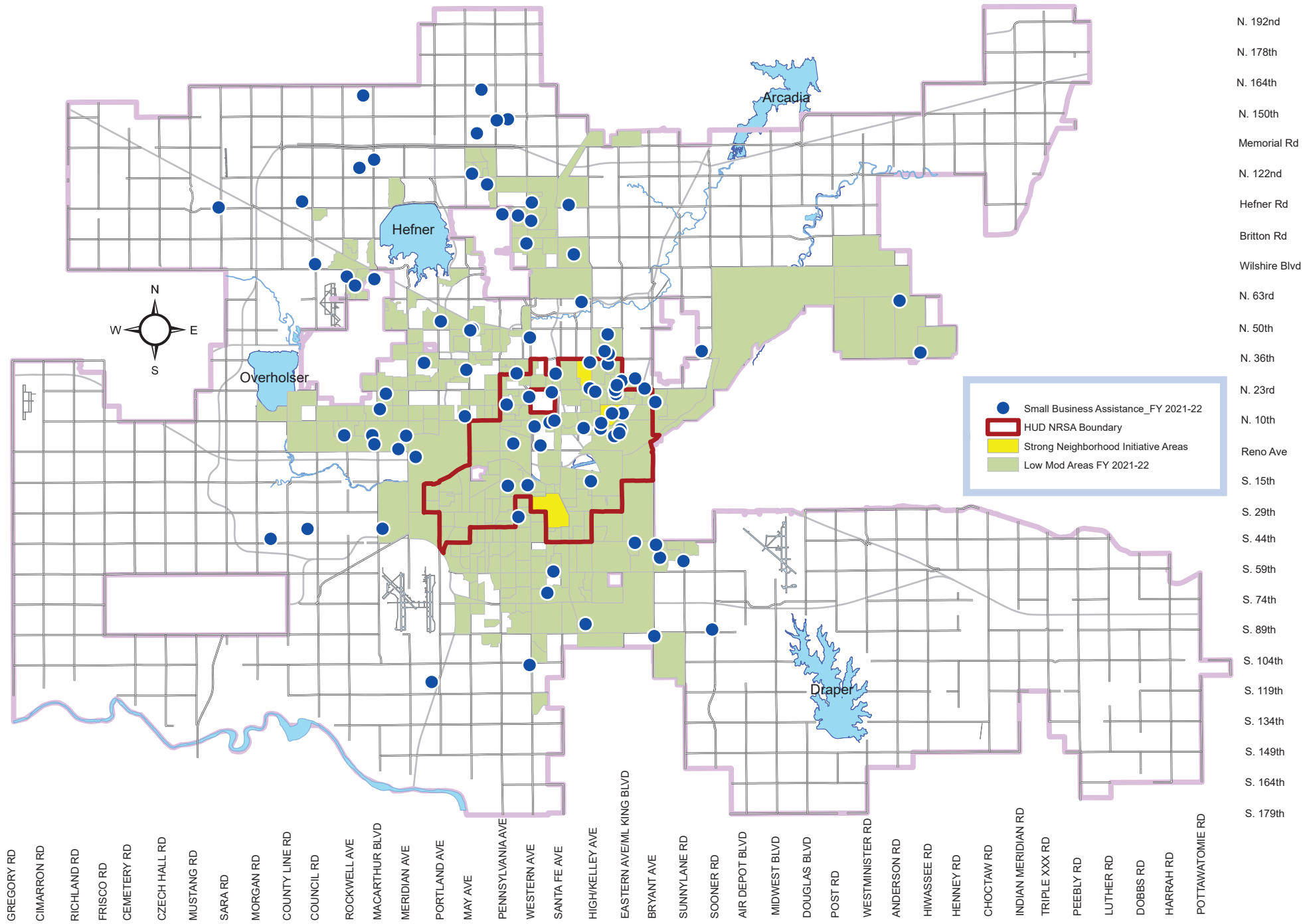




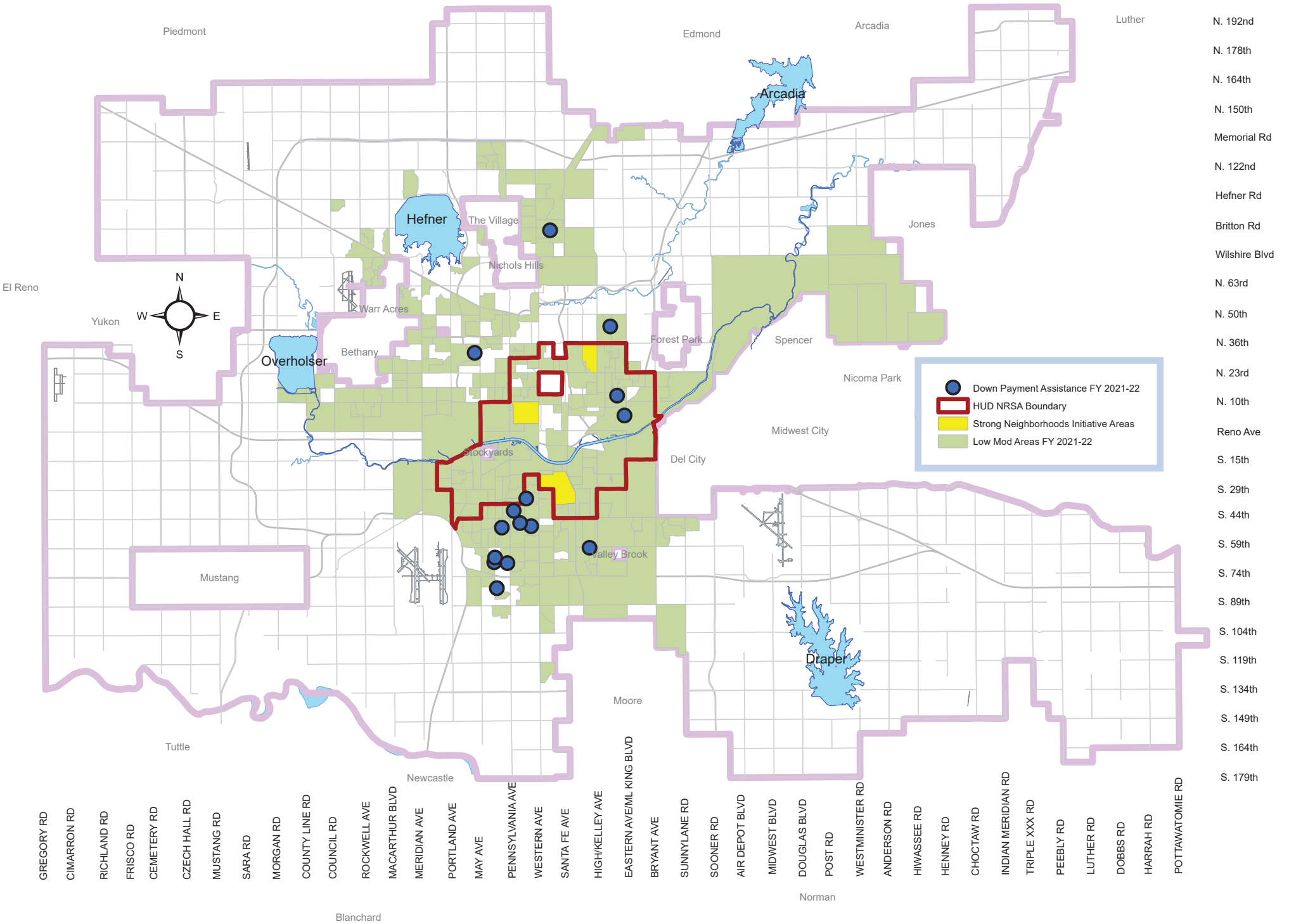
# Owner Occupied Housing Rehabilitation FY 2021-22



# Small Business Assistance FY 2021-22



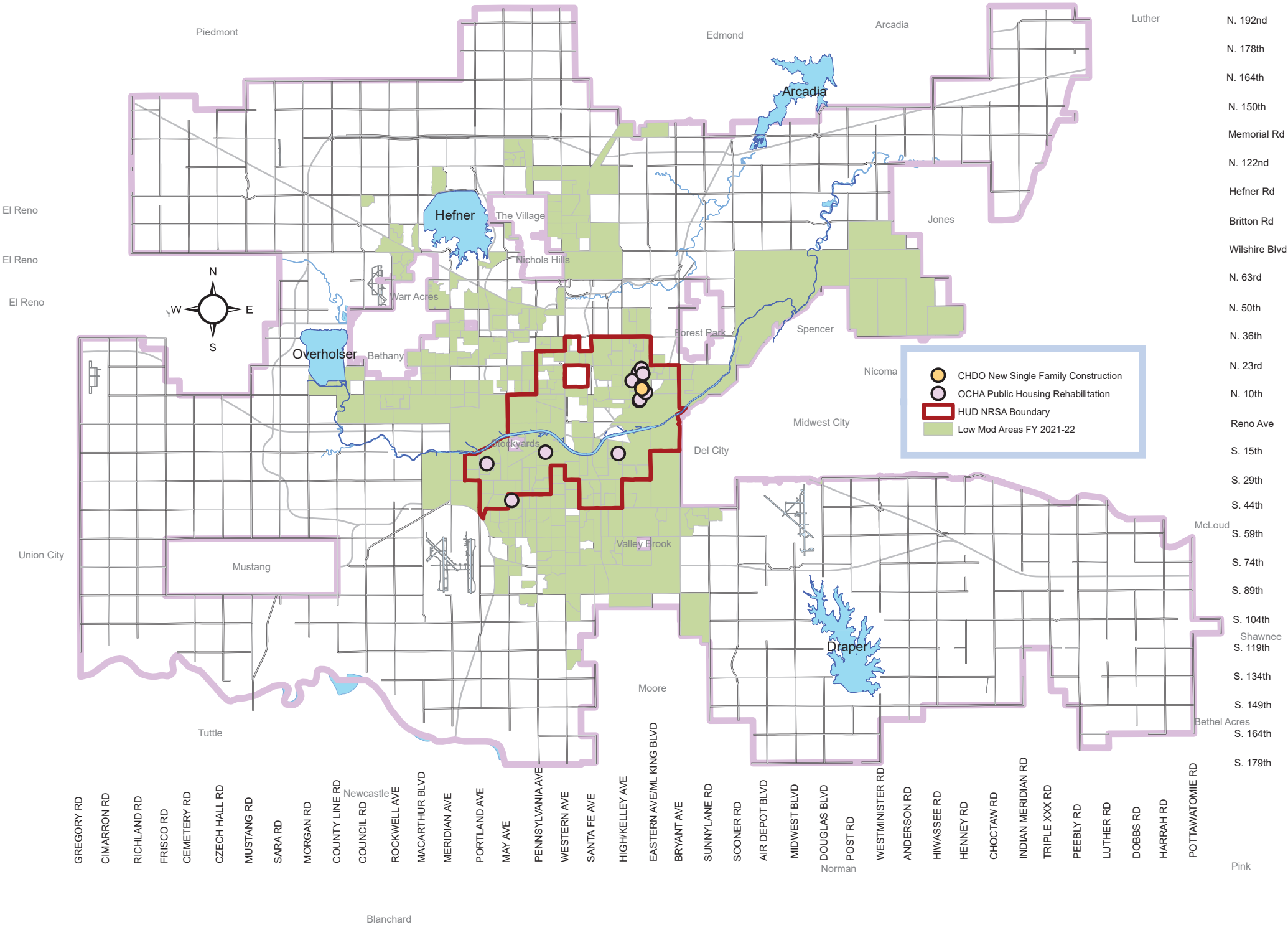
# Down Payment Assistance FY 2021-22



GREGORY RD  
 CIMARRON RD  
 RICHLAND RD  
 FRISCO RD  
 CEMETERY RD  
 CZECH HALL RD  
 MUSTANG RD  
 SARA RD  
 MORGAN RD  
 COUNTY LINE RD  
 COUNCIL RD  
 ROCKWELL AVE  
 MACARTHUR BLVD  
 MERIDIAN AVE  
 PORTLAND AVE  
 MAY AVE  
 PENNSYLVANIA AVE  
 WESTERN AVE  
 SANTA FE AVE  
 HIGH/KELLEY AVE  
 EASTERN AVE/ML KING BLVD  
 BRYANT AVE  
 SUNNYLANE RD  
 SOONER RD  
 AIR DEPOT BLVD  
 MIDWEST BLVD  
 DOUGLAS BLVD  
 POST RD  
 WESTMINSTER RD  
 ANDERSON RD  
 HIWASSEE RD  
 HENNEY RD  
 CHOCTAW RD  
 INDIAN MERIDIAN RD  
 TRIPLE XXX RD  
 PEEBLY RD  
 LUTHER RD  
 DOBBS RD  
 HARRAH RD  
 POTTAWATOMIE RD

N. 192nd  
 N. 178th  
 N. 164th  
 N. 150th  
 Memorial Rd  
 N. 122nd  
 Hefner Rd  
 Britton Rd  
 Wilshire Blvd  
 N. 63rd  
 N. 50th  
 N. 36th  
 N. 23rd  
 N. 10th  
 Reno Ave  
 S. 15th  
 S. 29th  
 S. 44th  
 S. 59th  
 S. 74th  
 S. 89th  
 S. 104th  
 S. 119th  
 S. 134th  
 S. 149th  
 S. 164th  
 S. 179th

# Single Family (SF) New Construction CHDO and SF Rehab Public Housing FY 2021-22



# APPENDIX 5

## ESG ECART REPORT



January	1399	1217	54	20	8
April	1393	54	1308	25	6
July	1225	1167	39	12	7
October	1343	1257	59	17	10

**Q09a: Number of Persons Contacted**

Number of Persons Contacted	All Persons Contacted	First contact – NOT staying on the Streets, ES, or SH	First contact – WAS staying on Streets, ES, or SH	First contact – Worker unable to determine
Once	340	0	284	1
2-5 Times	45	0	40	0
6-9 Times	6	0	5	0
10+ Times	6	0	5	0
Total Persons Contacted	397	0	334	1

**Q09b: Number of Persons Engaged**

Number of Persons Engaged	All Persons Contacted	First contact – NOT staying on the Streets, ES, or SH	First contact – WAS staying on Streets, ES, or SH	First contact – Worker unable to determine
Once	233	0	197	0
2-5 Contacts	20	0	16	0
6-9 Contacts	0	0	0	0
10+ Contacts	1	0	0	0
Total Persons Engaged	254	0	213	0
Rate of Engagement	63.98%	0	63.77%	0%

Numbers in green indicate have been replicated or weighted based on available totals.

**Q10a: Gender of Adults**

	Total	Without Children	With Children and Adults	Unknown Household Type
Male	2677	2593	82	2
Female	2041	1779	252	11
No Single Gender	20	20	0	0
Questioning	1	1	0	0
Transgender	26	26	0	0
Client Doesn't Know/Client Refused	0	0	0	0
Data Not Collected	6	5	1	0
Total	4771	4424	334	13
Trans Female (MTF or Male to Female)				
Trans Male (FTM or Female to Male)				

Effective 10/1/2021, this table contains a consolidated Transgender row which includes the sum of data from the previously separate Transgender rows, tagged with:

**Q10b: Gender of Children**

	Total	With Children and Adults	With Only Children	Unknown Household Type
Male	391	385	5	1
Female	339	367	7	5
No Single Gender	5	1	4	0
Questioning	0	0	0	0
Transgender	4	1	3	0
Client Doesn't Know/Client Refused	0	0	0	0
Data Not Collected	0	0	0	0
Total	739	554	173	12
Trans Female (MTF or Male to Female)				
Trans Male (FTM or Female to Male)				

Effective 10/1/2021, this table contains a consolidated Transgender row which includes the sum of data from the previously separate Transgender rows, tagged with:

**Q10c: Gender of Persons Missing Age Information**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Male	33	1	2	0	30
Female	23	1	2	0	20
No Single Gender	0	0	0	0	0
Questioning	0	0	0	0	0
Transgender	0	0	0	0	0
Client Doesn't Know/Client Refused	8	0	1	0	7
Data Not Collected	12	2	0	0	10
Total	76	2	5	0	69
Trans Female (MTF or Male to Female)					
Trans Male (FTM or Female to Male)					

Effective 10/1/2021, this table contains a consolidated Transgender row which includes the sum of data from the previously separate Transgender rows, tagged with:

**Q10d: Gender by Age Ranges**

	Total	Under Age 18	Age 18-24	Age 25-64	Age 65 and over	Client Doesn't Know/ Client Refused	Data Not Collected
Male	3101	391	250	2121	306	10	23
Female	2423	339	272	1558	111	5	18
No Single Gender	25	5	0	5	0	0	0
Questioning	1	0	0	0	0	0	0
Transgender	30	4	15	11	0	0	0
Client Doesn't Know/Client Refused	8	0	0	0	0	8	0
Data Not Collected	18	0	0	5	1	0	12
Total	5586	739	553	3800	418	23	53
Trans Female (MTF or Male to Female)							
Trans Male (FTM or Female to Male)							

Effective 10/1/2021, this table contains a consolidated Transgender row which includes the sum of data from the previously separate Transgender rows, tagged with:

**Q11: Age**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Under 5	232	182	48	2	0
5 - 12	331	0	253	7	71
13 - 17	176	0	119	54	3
18 - 24	553	490	62	0	1
25 - 34	1060	925	130	0	5
35 - 44	1120	1120	0	0	0
45 - 54	943	921	21	0	1
55 - 64	667	658	8	0	1
65+	416	416	0	0	0
Client Doesn't Know/Client Refused	23	0	2	0	21
Data Not Collected	53	2	3	0	48
Total	5586	4426	893	173	94

**Q12a: Race**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
White	2668	2244	310	62	32
Black, African American, or African American	1836	1700	136	17	24
Asian or Asian American	15	10	2	2	1
American Indian, Alaska Native, or Indigenous	381	325	52	42	2
Native Hawaiian or Pacific Islander	39	34	0	1	4
Multiple Races	481	313	134	28	6
Client Doesn't Know/Client Refused	69	5	52	1	11
Data Not Collected	80	32	26	10	12
Total	5586	4426	893	173	94

**Q12b: Ethnicity**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Non-Hispanic/Non-Latin(a)(o)(l)	4981	4557	723	139	62
Hispanic/Latin(a)(o)(l)	478	291	154	23	10
Client Doesn't Know/Client Refused	12	2	12	9	0
Data Not Collected	103	65	14	11	13
Total	5586	4426	893	173	94

**Q13a: Physical and Mental Health Conditions at Entry**

	Total Persons	Without Children	Adults in HH with Children & Adults	Children in HH with Children & Adults	With Children and Adults	With Only Children	Unknown Household Type
Mental Health Disorder	1408	1283	77	17	22	9	9
Alcohol Use Disorder	149	163	5	0	1	0	0
Drug Use Disorder	138	123	12	1	0	1	2
Both Alcohol Use and Drug Use Disorders	338	346	8	0	1	3	3
Chronic Health Condition	680	589	37	5	6	6	6
HIV/AIDS	18	17	1	0	0	0	0
Developmental Disability	197	156	27	24	8	3	3
Physical Disability	563	518	27	12	3	3	3

The "With Children and Adults" column is revised as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

**Q13b: Physical and Mental Health Conditions at Exit**

	Total Persons	Without Children	Adults in HH with Children & Adults	Children in HH with Children & Adults	With Children and Adults	With Only Children	Unknown Household Type
Mental Health Disorder	734	657	47	12	17	1	1
Alcohol Use Disorder	86	83	3	0	0	0	0
Drug Use Disorder	182	173	7	1	1	1	1
Both Alcohol Use and Drug Use Disorders	69	68	2	0	0	0	0
Chronic Health Condition	335	302	15	11	4	3	3

HIV/AIDS	9	9	0	0	0	0	0
Developmental Disability	108	2	45	8	11	2	2
Physical Disability	330	306	14	5	4	1	1

The "With Children and Adults" column is revised as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

Q13c1: Physical and Mental Health Conditions for Stayers	Total Persons	Without Children	Adults in HH with Children & Adults	Children in HH with Children & Adults	With Children and Adults	With Only Children	Unknown Household Type
Mental Health Disorder	558	23	5	5	5	5	5
Alcohol Use Disorder	81	78	2	0	1	0	0
Drug Use Disorder	155	4	155	0	0	0	1
Both Alcohol Use and Drug Use Disorders	165	159	5	0	0	0	1
Chronic Health Condition	313	281	17	10	3	2	2
HIV/AIDS	9	8	1	0	1	0	0
Developmental Disability	89	72	10	3	3	1	1
Physical Disability	235	217	12	5	1	0	0

The "With Children and Adults" column is revised as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

Q14a: Domestic Violence History	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Yes	708	584	108	16	0
No	3878	3829	205	38	0
Client Doesn't Know/Client Refused	19	18	0	0	1
Data Not Collected	289	201	6	28	6
Total	4870	4424	341	60	6

Q14b: Persons Fleeing Domestic Violence	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Yes	326	241	89	5	0
No	290	288	23	0	0
Client Doesn't Know/Client Refused	3	1	1	0	0
Data Not Collected	4	4	0	1	0
Total	708	584	108	16	0

Q15: Living Situation	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
<b>Homeless Situations</b>					
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	1473	1405	49	15	4
Transitional housing for homeless persons (including homeless youth)	110	3	105	2	0
Place not meant for habitation	1817	70	1732	10	5
Safe Haven	155	148	6	1	0
Host Home (non-crisis)	17	17	0	0	0
Interim Housing					
Subtotal	2572	1407	128	28	9
<b>Institutional Settings</b>					
Psychiatric hospital or other psychiatric facility	20	19	0	1	0
Substance abuse treatment facility or detox center	260	0	254	6	0
Hospital or other residential non-psychiatric medical facility	25	25	0	0	0
Jail, prison or juvenile detention facility	56	55	0	1	0
Foster care home or foster care group home	8	8	0	0	0
Long-term care facility or nursing home	6	6	0	0	0
Residential project or halfway house with no homeless criteria	11	10	0	0	0
Subtotal	386	377	1	8	0
<b>Other Locations</b>					
Permanent housing (other than RRH) for formerly homeless persons	13	9	4	0	0
Owned by client, no ongoing housing subsidy	10	10	0	0	0
Owned by client, with ongoing housing subsidy	5	4	0	1	0
Rental by client, with RRH or equivalent subsidy	2	1	0	0	0
Rental by client, with HCV voucher (tenant or project based)	7	5	2	0	0
Rental by client in a public housing unit	18	18	0	0	0
Rental by client, no ongoing housing subsidy	286	164	116	6	0
Rental by client, with VASH subsidy	7	7	0	0	0
Rental by client with QRO TR subsidy	2	2	0	0	0
Rental by client, with other housing subsidy	22	14	7	0	1
Hotel or motel paid for without emergency shelter voucher	7	7	0	0	0
Staying or living in a friend's room, apartment or house	134	134	0	0	0
Staying or living in a family member's room, apartment or house	155	131	12	0	12
Client Doesn't Know/Client Refused	13	12	0	1	0
Data Not Collected	181	111	41	0	29
Subtotal	912	640	212	24	36
Total	4870	341	241	60	42

Homeless housing is revised as of 10/1/2019.

Q16: Cash Income - Ranges	Income at Start	Income at Latest Annual Assessment for Stayers	Income at Exit for Leavers
No Income	3451	11	2392
\$1 - \$150	32	1	23
\$151 - \$200	50	0	17
\$201 - \$300	108	1	98
\$301 - \$400	514	7	304
\$401 - \$5,000	149	0	81
\$1,001 - \$2,000	84	2	48
\$2,001+	81	1	46
Client Doesn't Know/Client Refused	13	0	25
Data Not Collected	269	0	221
Number of Adult Stayers Not Yet Required to Have an Annual Assess	0	1079	0
Number of Adult Stayers Without Required Annual Assessment	0	455	0
Total Adults	4771	1556	3215

Q17: Cash Income - Sources	Income at Start	Income at Latest Annual Assessment for Stayers	Income at Exit for Leavers
Earned Income	295	185	185
Unemployment Insurance	22	0	20
SSI	214	6	183
SSD	294	2	155
VA Service-Connected Disability Compensation	11	0	6
VA Non-Service-Connected Disability Pension	7	0	0
Private Disability Insurance	4	0	2
Worker's Compensation	2	0	0
TANF or Equivalent	1	27	13
General Assistance	3	1	1
Retirement (Social Security)	27	0	21
Pension from Former Job	24	0	20
Child Support	33	2	17
Alimony (Spousal Support)	1	0	0
Other Source	101	1	36
Adults with Income Information at Start and Annual Assessment/Exit	0	23	67

Q18: Disabling Conditions and Income for Adults at Exit	AO: Adult with Disabling Condition	AO: Adult without Disabling Condition	AO: Total Adults	AO: % with Disabling Condition by Source	AC: Adult with Disabling Condition	AC: Adult without Disabling Condition	AC: Total Adults	AC: % with Disabling Condition by Source	UK: Adult with Disabling Condition	UK: Adult without Disabling Condition	UK: Total Adults	UK: % with Disabling Condition by Source
Earned Income	65	76	141	46.10%	6	32	38	15.79%	0	3	3	0%
Supplemental Security Income (SSI)	133	199	332	39.8%	4	133	137	66.3%	1	0	1	100.00%
Social Security Disability Insurance (SSDI)	122	24	146	83.56%	2	5	7	28.57%	1	0	1	100.00%
VA Service-Connected Disability Compensation	3	0	3	100.00%	0	0	0	100.00%	0	0	0	0%
Private Disability Insurance	1	0	1	100.00%	0	1	1	0%	0	0	0	0%
Worker's Compensation	0	1	0	0%	0	0	0	0%	0	0	0	0%
Temporary Assistance for Needy Families (TANF)	8	4	12	66.67%	4	2	6	66.67%	0	0	0	0%
Retirement Income from Social Security	15	4	21	71.43%	0	1	1	0%	0	0	0	0%
Pension or retirement income from a former job	2	6	8	25.00%	0	10	10	0%	0	0	0	0%
Child Support	15	4	19	78.95%	1	6	7	42.86%	0	0	0	0%
Other Source	30	17	47	63.83%	17	14	31	67.7%	0	1	1	0%
No Sources	39	1538	1577	20.14%	27	91	118	22.88%	0	3	3	0%
Unspecified Total Adults	728	1775	2503		50	165	215		1	7	8	

Numbers in green cells have been recalculated or flagged based on available totals.

Q20a: Type of Non-Cash Benefit Sources	Benefit at Start	Benefit at Latest Annual Assessment for Stayers	Benefit at Exit for Leavers
Supplemental Nutritional Assistance Program	21	973	500
WIC	1	15	15
TANF Child Care Services	4	0	0
TANF Transportation Services	4	0	2
Other TANF-Funded Services	11	0	1
Other Source	19	0	11



<b>Q21: Health Insurance</b>	<b>At Start</b>	<b>At Annual Assessment for Stayers</b>	<b>At Exit for Leavers</b>
Medicaid	983	9	340
Medicare	261	1	157
State Children's Health Insurance Program	121	83	10
VA Medical Services	24	0	14
Employer Provided Health Insurance	27	0	20
Health Insurance Through COBRA	4	0	3
Private Pay Health Insurance	54	0	20
State Health Insurance for Adults	147	3	113
Indian Health Services Program	41	1	26
Other	23	0	15
No Health Insurance	3649	9	2605
Client Doesn't Know/Client Refused	27	0	22
Data Not Collected	0	0	480
Number of Stayers Not Yet Required to Have an Annual Assessment	0	2264	0
1 Source of Health Insurance	1270	0	518
More than 1 Source of Health Insurance	192	1	123

<b>Q22a: Length of Participation – ESG Projects</b>	<b>Total</b>	<b>Leavers</b>	<b>Stayers</b>
0 to 7 days	2429	2269	160
8 to 14 days	96	77	19
15 to 21 days	97	64	33
22 to 30 days	137	83	54
31 to 60 days	322	216	106
61 to 90 days	296	189	107
91 to 180 days	569	322	247
181 to 365 days	829	540	289
366 to 730 days (1-2 Yrs)	580	390	190
731 to 1,095 days (2-3 Yrs)	172	76	96
1,096 to 1,460 days (3-4 Yrs)	42	10	32
1,461 to 1,825 days (4-5 Yrs)	9	3	6
More than 1,825 days (5-5 Yrs)	8	2	6
Data Not Collected	0	0	0
Total	5586	3810	1776

<b>Q22b: Length of Time between Project Start Date and Housing Move-in Date (exit 10/1/2018)</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
7 days or less	47	7	40	0	0
8 to 14 days	3	3	0	0	0
15 to 21 days	5	5	0	0	0
22 to 30 days	6	6	0	0	0
31 to 60 days	20	2	18	0	0
61 to 180 days	36	16	20	0	0
181 to 365 days	7	5	2	0	0
366 to 730 days (1-2 Yrs)	14	11	3	0	0
731 to 1,095 days (2-3 Yrs)	139	97	42	0	0
Average length of time to housing	97.03	58.72	155.62	0	0
Persons who were exited without move-in	184	22	162	0	0
Total persons	164	100	64	0	0

Numbers in green cells have been recalculated or weighted based on available totals.

<b>Q22c: RRH Length of Time between Project Start Date and Housing Move-in Date (exit 10/1/2018)</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
7 days or less	47	7	40	0	0
8 to 14 days	3	3	0	0	0
15 to 21 days	5	5	0	0	0
22 to 30 days	6	6	0	0	0
31 to 60 days	20	2	18	0	0
61 to 180 days	36	16	20	0	0
181 to 365 days	7	5	2	0	0
366 to 730 days (1-2 Yrs)	14	11	3	0	0
731 to 1,095 days (2-3 Yrs)	139	97	42	0	0
Average length of time to housing	97.03	58.72	155.62	0	0
Persons who were exited without move-in	184	22	162	0	0
Total persons	164	100	64	0	0

Numbers in green cells have been recalculated or weighted based on available totals.

<b>Q22d: Length of Participation by Household Type</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
7 days or less	2429	2124	217	43	45
8 to 14 days	96	69	19	6	2
15 to 21 days	97	63	26	4	1
22 to 30 days	137	77	49	10	1
31 to 60 days	322	199	129	30	4
61 to 90 days	296	174	105	7	7
91 to 180 days	569	392	199	26	12
181 to 365 days	829	544	329	37	12
366 to 730 days (1-2 Yrs)	580	504	55	14	7
731 to 1,095 days (2-3 Yrs)	172	7	164	1	0
1,096 to 1,460 days (3-4 Yrs)	42	37	3	2	0
1,461 to 1,825 days (4-5 Yrs)	9	9	0	0	0
More than 1,825 days (5-5 Yrs)	8	8	0	0	0
Data Not Collected	0	0	0	0	0
Total	5586	4426	893	173	119

<b>Q22e: Length of Time Prior to Housing - based on 3.917 Date Homelessness Started</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
7 days or less	497	373	63	9	1
8 to 14 days	106	101	3	1	1
15 to 21 days	104	6	95	2	1
22 to 30 days	137	128	3	0	0
31 to 60 days	187	32	154	1	0
61 to 180 days	398	69	317	12	0
181 to 365 days	283	238	37	8	0
366 to 730 days (1-2 Yrs)	194	158	32	2	0
731 days or more	320	287	32	0	1
Total (persons moved into housing)	2226	1851	267	94	14
Not yet moved into housing	56	0	56	0	0
Data not collected	817	640	125	43	0
Total persons	3099	2512	427	103	57

<b>Q23a: Exit Destination – More Than 90 Days/This question is retired as of 10/1/2019.</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
<b>Permanent Destinations</b>					
Moved from one HOPWA funded project to HOPWA PH					
Owned by client, no ongoing housing subsidy					
Owned by client, with ongoing housing subsidy					
Rental by client, no ongoing housing subsidy					
Rental by client, with WASH housing subsidy					
Rental by client, with GPO TIP housing subsidy					
Rental by client, with other ongoing housing subsidy					
Permanent housing (other than RRH) for formerly homeless persons					
Staying or living with family, permanent tenure					
Staying or living with friends, permanent tenure					
Rental by client, with RRH or equivalent subsidy					
Subtotal					
<b>Temporary Destinations</b>					
Emergency shelter, including hotel or motel paid for with emergency shelter voucher					
Moved from one HOPWA funded project to HOPWA TH					
Transitional housing for homeless persons (including homeless youth)					
Staying or living with family, temporary tenure (e.g. room, apartment or house)					
Staying or living with friends, temporary tenure (e.g. room, apartment or house)					
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)					
Safe Haven					
Hotel or motel paid for without emergency shelter voucher					
Subtotal					
<b>Institutional Settings</b>					
Foster care home or group foster care home					

Psychiatric hospital or other psychiatric facility					
Substance abuse treatment facility or detox center					
Hospital or other residential non-psychiatric medical facility					
Jail, prison, or juvenile detention facility					
Long-term care facility or nursing home					
Subtotal					
<b>Other Destinations</b>					
Residential project or halfway house with no homeless criteria					
Deceased					
Other					
Client Doesn't Know/Client Refused					
Data Not Collected (no exit interview completed)					
Subtotal					
Total					
Total persons exiting to positive housing destinations					
Total persons whose destinations excluded them from the calculation					
Percentage	Cannot calculate1	Cannot calculate1	Cannot calculate1	Cannot calculate1	Cannot calculate1

Numbers in green italics have been recalculated or weighted based on available totals.

<b>Q23b: Exit Destination – 90 Days or Less This question is retired as of 10/1/2015</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
<b>Permanent Destinations</b>					
Moved from one HOPWA funded project to HOPWA PH					
Owned by client, no ongoing housing subsidy					
Owned by client, with ongoing housing subsidy					
Rental by client, no ongoing housing subsidy					
Rental by client, with VASH housing subsidy					
Rental by client, with GPO TP housing subsidy					
Rental by client, with other ongoing housing subsidy					
Permanent housing (other than RHH) for formerly homeless persons					
Staying or living with family, permanent tenure					
Staying or living with friends, permanent tenure					
Rental by client, with RHH or equivalent subsidy					
Subtotal					
<b>Temporary Destinations</b>					
Emergency shelter, including hotel or motel paid for with emergency shelter voucher					
Moved from one HOPWA funded project to HOPWA TH					
Transitional housing for homeless persons (including homeless youth)					
Staying or living with family, temporary tenure (e.g. room, apartment or house)					
Staying or living with friends, temporary tenure (e.g. room, apartment or house)					
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)					
Safe Haven					
Hotel or motel paid for without emergency shelter voucher					
Subtotal					
<b>Institutional Settings</b>					
Foster care home or group foster care home					
Psychiatric hospital or other psychiatric facility					
Substance abuse treatment facility or detox center					
Hospital or other residential non-psychiatric medical facility					
Jail, prison, or juvenile detention facility					
Long-term care facility or nursing home					
Subtotal					
<b>Other Destinations</b>					
Residential project or halfway house with no homeless criteria					
Deceased					
Other					
Client Doesn't Know/Client Refused					
Data Not Collected (no exit interview completed)					
Subtotal					
Total					
Total persons exiting to positive housing destinations					
Total persons whose destinations excluded them from the calculation					
Percentage	Cannot calculate1	Cannot calculate1	Cannot calculate1	Cannot calculate1	Cannot calculate1

Numbers in green italics have been recalculated or weighted based on available totals.

<b>Q23c: Exit Destination – All persons</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
<b>Permanent Destinations</b>					
Moved from one HOPWA funded project to HOPWA PH	0	0	0	0	0
Owned by client, no ongoing housing subsidy	2	2	0	0	0
Owned by client, with ongoing housing subsidy	6	4	1	1	0
Rental by client, no ongoing housing subsidy	328	93	216	7	12
Rental by client, with VASH housing subsidy	8	4	4	0	0
Rental by client, with GPO TP housing subsidy	0	0	0	0	0
Rental by client, with other ongoing housing subsidy	70	34	33	3	0
Permanent housing (other than RHH) for formerly homeless persons	35	19	16	0	0
Staying or living with family, permanent tenure	39	5	23	11	0
Staying or living with friends, permanent tenure	10	8	2	0	0
Rental by client, with RHH or equivalent subsidy	14	8	6	0	0
Rental by client, with HCV voucher (tenant or project based)	94	65	29	0	0
Rental by client in a public housing unit	109	81	26	0	2
Subtotal	715	339	340	22	14
<b>Temporary Destinations</b>					
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	912	839	65	3	5
Moved from one HOPWA funded project to HOPWA TH	0	0	0	0	0
Transitional housing for homeless persons (including homeless youth)	15	13	0	2	0
Staying or living with family, temporary tenure (e.g. room, apartment or house)	40	23	11	6	0
Staying or living with friends, temporary tenure (e.g. room, apartment or house)	44	29	6	7	2
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	324	280	40	3	1
Safe Haven	425	425	25	3	18
Hotel or motel paid for without emergency shelter voucher	3	2	0	1	0
Host Home (non-crisis)	0	0	0	0	0
Subtotal	1773	1473	147	25	25
<b>Institutional Settings</b>					
Foster care home or group foster care home	1	0	0	1	0
Psychiatric hospital or other psychiatric facility	2	0	0	0	0
Substance abuse treatment facility or detox center	3	3	0	0	0
Hospital or other residential non-psychiatric medical facility	5	5	0	0	0
Jail, prison, or juvenile detention facility	15	14	0	1	0
Long-term care facility or nursing home	4	4	0	0	0
Subtotal	30	30	0	2	0
<b>Other Destinations</b>					
Residential project or halfway house with no homeless criteria	1	1	0	0	0
Deceased	6	6	0	0	0
Other	55	51	0	3	1
Client Doesn't Know/Client Refused	23	23	0	0	0
Data Not Collected (no exit interview completed)	1207	928	192	47	40
Subtotal	1292	1009	192	50	41
Total	3810	2991	679	99	851
Total persons exiting to positive housing destinations	401	264	114	22	1
Total persons whose destinations excluded them from the calculation	0	0	11	1	1
Percentage	10.50%	8.98%	16.79%	22.45%	1.23%

Numbers in green italics have been recalculated or weighted based on available totals.

<b>Q24: Homelessness Prevention Housing Assessment at Exit</b>	<b>Total</b>	<b>Without Children</b>	<b>With Children and Adults</b>	<b>With Only Children</b>	<b>Unknown Household Type</b>
Able to maintain the housing they had at project start--Without a subsidy	5	5	0	0	0
Able to maintain the housing they had at project start--With the subsidy they had at project start	78	16	60	0	2
Able to maintain the housing they had at project start--With an on-site subsidy acquired since project start	1	1	0	0	0
Able to maintain the housing they had at project start--Only with financial assistance other than a subsidy	0	0	0	0	0

Moved to new housing unit- With on going subsidy	19	10	9	0	0
Moved to new housing unit- Without an on going subsidy	5	5	0	0	0
Moved in with family/friends on a permanent basis	5	0	5	0	0
Moved to a transitional or temporary housing facility or program	0	0	0	0	0
Client became homeless – moving to a shelter or other place unfit for human habitation	1	1	0	0	0
Client went to jail/prison	0	0	0	0	0
Client died	0	0	0	0	0
Client doesn't know/Client refused	28	28	0	0	0
Data not collected (no exit interview completed)	544	301	219	5	19
Total	686	367	293	5	21

**Q25a: Number of Veterans**

	Total	Without Children	With Children and Adults	Unknown Household Type
Chronically Homeless Veteran	43	43	0	0
Non Chronically Homeless Veteran	239	227	11	1
Not a Veteran	4306	3982	322	12
Client Doesn't Know/Client Refused	3	3	0	0
Data Not Collected	177	167	10	0
Total	4771	4424	334	13

**Q25b: Number of Chronically Homeless Persons by Household**

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Chronically Homeless	617	548	64	2	3
Not Chronically Homeless	2983	2727	252	24	24
Client Doesn't Know/Client Refused	31	35	1	2	3
Data Not Collected	1957	1679	101	119	64
Total	5586	4929	418	125	94

**HUD ESG-CV**

Filters for this report  
 Client ID 102589  
 Q4a record ID (all)  
 Submission ID 114572  
 Report executed on 10/4/2022 5:56:59 PM

**Report Date Range**

7/1/2021 to 9/30/2021

**Report first submitted to HUD on**

10/30/2021

**Reporting Requirements Identified**

Have you executed your ESG-CV Grant Agreement? **Yes**  
 Have you made any expenditures? **Yes**  
**HMIS, Admin, Landlord Incentives, Temporary Emergency Shelter, Emergency Shelter, Street Outreach, Rapid Re-Housing, Homelessness Prevention**  
 Identify the expenditures made to date

**HMIS/VSP Contacts Identified**

Organization	HMIS/VSP ID	VSP?	Contact Name	Contact Email	Contact Phone
Homeless Alliance	ISOK	No	Keith Anderson	hmis@isok.biz	9188526819

**Project and Bundle List**

Component Type	Sub-recipient	Sub-subrecipient	Project Name	Carried Forward?	Start Date	End Date	HMIS ID	HMIS Full Name	VSP?	Bundle - Quarterly	Bundle Sent?	Bundle - Cumulative	Bundle Sent?
Emergency Shelter (CV)	Homeless Alliance		Alliance- OKC Day Shelter (11520)	Y	2/1/2021	6/30/2021	ISOK	Homeless Alliance	No			ISOK-ES-CV-3	Yes
Emergency Shelter (CV)	SISU Youth		SISU-Emergency Shelter (ES) (ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-2	Yes
Homelessness Prevention	Catholic Charities		Catholic Charities OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-2	Yes
Homelessness Prevention	Homeless Alliance		HA- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-2	Yes
Homelessness Prevention	Legal Aid Services of Oklahoma		Legal Aid OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020	9/30/2021	ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-2	Yes
Homelessness Prevention	Neighborhood Services Organization		NSO- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	10/1/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Positive Tomorrows		Pos Tom- Homeless Prevention (HP)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-4	Yes
Homelessness Prevention	Upward Transitions		Upward- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-2	Yes
PH - Rapid Re-Housing	City Rescue Mission		CRM- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Homeless Alliance		HA-COVID 19 ESG RRH (RRH)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-2	Yes
PH - Rapid Re-Housing	Pivot		Pivot- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Positive Tomorrows		Pos Tom- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
Street Outreach	Homeless Alliance		HA-COVID 19 ESG Street Outreach (Out)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-SO-1	Yes	ISOK-SO-2	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	3/15/2020	9/30/2020	ISOK	Homeless Alliance	No			ISOK-TE5-2	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	Y	10/1/2020	1/31/2021	ISOK	Homeless Alliance	No			ISOK-TE5-6	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	N	8/1/2021		ISOK	Homeless Alliance	No	ISOK-TE5-1	Yes	ISOK-TE5-5	Yes
Temporary Emergency Shelter	Mental Health Association Oklahoma	Homeless Alliance	Alliance- Willard Emergency Shelter (ES)(ESG-CV) (12312)	Y	1/1/2021	4/30/2021	ISOK	Homeless Alliance	No			ISOK-TE5-4	Yes

**CUMULATIVE Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	5	1870	1859
Day Shelter	1	2244	1606
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>6</b>	<b>4114</b>	<b>3465</b>
Total Street Outreach	1	48	44
Total PH - Rapid Re-Housing	4	360	215
Total Homelessness Prevention	6	1456	629

**QUARTERLY Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	2	53	50
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>2</b>	<b>53</b>	<b>50</b>
Total Street Outreach	1	23	22
Total PH - Rapid Re-Housing	4	321	189
Total Homelessness Prevention	6	816	343

**Narrative for Projects Missing on Previous Submission**

- no data -

**Information on Allowable Activities**

1	5177410	102589	114572	106606	1	291	0
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**Financial Information**

1	5172394	102589	114572	106606	1	288	0
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**Contact Information**

1	5065702	102589	114572	106606	1	287	0
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**Additional Comments**

- no data -

**HUD ESG-CV**

Filters for this report  
 Client ID 102589  
 Q4a record ID (all)  
 Submission ID 114934  
 Report executed on 10/4/2022 5:57:58 PM

**Report Date Range**

10/1/2021 to 12/31/2021

**Report first submitted to HUD on**

1/27/2022

**Reporting Requirements Identified**

Have you executed your ESG-CV Grant Agreement? **Yes**  
 Have you made any expenditures? **Yes**  
**HMIS, Admin, Temporary Emergency Shelter, Emergency Shelter, Street Outreach, Rapid Re-Housing, Homelessness Prevention, Landlord Incentives**  
 Identify the expenditures made to date

**HMIS/VSP Contacts Identified**

Organization	HMIS/VSP ID	VSP?	Contact Name	Contact Email	Contact Phone
Homeless Alliance	ISOK	No	Keith Anderson	hmis@isok.biz	9188526819

**Project and Bundle List**

Component Type	Subrecipient	Sub-subrecipient	Project Name	Carried Forward?	Start Date	End Date	HMIS ID	HMIS Full Name	VSP?	Bundle - Quarterly	Bundle Sent?	Bundle - Cumulative	Bundle Sent?
Emergency Shelter (CV)	Homeless Alliance		Alliance- OKC Day Shelter (11520)	Y	2/1/2021	6/30/2021	ISOK	Homeless Alliance	No			ISOK-ES-CV-3	Yes
Emergency Shelter (CV)	SISU Youth		SISU-Emergency Shelter (ES) (ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-2	Yes
Homelessness Prevention	Catholic Charities		Catholic Charities OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Homeless Alliance		HA- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Legal Aid Services of Oklahoma		Legal Aid OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020	9/30/2021	ISOK	Homeless Alliance	No			ISOK-HP-2	Yes
Homelessness Prevention	Neighborhood Services Organization		NSO- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	10/1/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-4	Yes
Homelessness Prevention	Positive Tomorrows		Pos Tom- Homeless Prevention (HP)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-5	Yes
Homelessness Prevention	Upward Transitions		Upward- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
PH - Rapid Re-Housing	City Rescue Mission		CRM- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Homeless Alliance		HA-COVID 19 ESG RRH (RRH)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-2	Yes
PH - Rapid Re-Housing	Pivot		Pivot- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Positive Tomorrows		Pos Tom- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
Street Outreach	Homeless Alliance		HA-COVID 19 ESG Street Outreach (Out)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-SO-1	Yes	ISOK-SO-2	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	8/1/2021		ISOK	Homeless Alliance	No	ISOK-TES-1	Yes	ISOK-TES-6	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	Y	10/1/2020	1/31/2021	ISOK	Homeless Alliance	No			ISOK-TES-4	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	3/15/2020	9/30/2020	ISOK	Homeless Alliance	No			ISOK-TES-3	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	N	11/1/2021		ISOK	Homeless Alliance	No	ISOK-TES-2	Yes	ISOK-TES-7	Yes
Temporary Emergency Shelter	Mental Health Association Oklahoma	Homeless Alliance	Alliance- Willard Emergency Shelter (ES)(ESG-CV) (12312)	Y	1/1/2021	4/30/2021	ISOK	Homeless Alliance	No			ISOK-TES-5	Yes

**CUMULATIVE Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	6	2106	2045
Day Shelter	1	2244	1611
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>7</b>	<b>4350</b>	<b>3656</b>
Total Street Outreach	1	59	53
Total PH - Rapid Re-Housing	4	468	282
Total Homelessness Prevention	6	1572	687

**QUARTERLY Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	3	262	209
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>3</b>	<b>262</b>	<b>209</b>
Total Street Outreach	1	25	23
Total PH - Rapid Re-Housing	4	373	222
Total Homelessness Prevention	5	220	87

**Narrative for Projects Missing on Previous Submission**

- no data -

**Information on Allowable Activities**

1	5594129	102589	114934	106606	1	291	0
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**Financial Information**

1	5608467	102589	114934	106606	1	288	0
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**Contact Information**

1	5594140	102589	114934	106606	1	287	0
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**Additional Comments**

1	5609348	102589	114934	106606	1	289	0
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**HUD ESG-CV**  
 Filters for this report  
 Client ID 102589  
 Q4a record ID (all)  
 Submission ID 115296  
 Report executed on 10/4/2022 5:58:50 PM

**Report Date Range**  
 1/1/2022 to 3/31/2022

**Report first submitted to HUD on**  
 4/20/2022

**Reporting Requirements Identified**  
 Have you executed your ESG-CV Grant Agreement? **Yes**  
 Have you made any expenditures? **Yes**  
**HMIS, Admin, Landlord Incentives, Temporary Emergency Shelter, Emergency Shelter, Street Outreach, Rapid Re-Housing, Homelessness Prevention**  
 Identify the expenditures made to date

**HMIS/VSP Contacts Identified**

Organization	HMIS/VSP ID	VSP?	Contact Name	Contact Email	Contact Phone
Homeless Alliance	ISOK	No	Keith Anderson	hmis@isok.biz	9188526819

Component Type	Subrecipient	Sub-subrecipient	Project Name	Carried Forward?	Start Date	End Date	HMIS ID	HMIS Full Name	VSP?	Bundle - Quarterly	Bundle Sent?	Bundle - Cumulative	Bundle Sent?
Emergency Shelter (CV)	Homeless Alliance		Alliance- OKC Day Shelter (11520)	Y	2/1/2021	6/30/2021	ISOK	Homeless Alliance	No			ISOK-ES-CV-3	Yes
Emergency Shelter (CV)	Homeless Alliance		HA-COVID 19 ESG Entries Day Shelter (ES)(ESG-CV)(12320)	N	11/1/2021		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-4	Yes
Emergency Shelter (CV)	SISU Youth		SISU-Emergency Shelter (ES) (ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-2	Yes
Homelessness Prevention	Catholic Charities		Catholic Charities OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Homeless Alliance		HA- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Legal Aid Services of Oklahoma		Legal Aid OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020	9/30/2021	ISOK	Homeless Alliance	No			ISOK-HP-2	Yes
Homelessness Prevention	Neighborhood Services Organization		NSO- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	10/1/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-4	Yes
Homelessness Prevention	Positive Tomorrows		Pos Tom- Homeless Prevention (HP)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-5	Yes
Homelessness Prevention	Upward Transitions		Upward- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
PH - Rapid Re-Housing	City Rescue Mission		CRM- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Homeless Alliance		HA-COVID 19 ESG RRH (RRH)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-2	Yes
PH - Rapid Re-Housing	Pivot		Pivot- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Positive Tomorrows		Pos Tom- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
Street Outreach	Homeless Alliance		HA-COVID 19 ESG Street Outreach (Out)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-SO-1	Yes	ISOK-SO-2	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	3/15/2020	9/30/2020	ISOK	Homeless Alliance	No			ISOK-TE-2	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	Y	10/1/2020	1/31/2021	ISOK	Homeless Alliance	No			ISOK-TE-3	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	8/1/2021		ISOK	Homeless Alliance	No	ISOK-TE-1	Yes	ISOK-TE-5	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	Y	11/1/2021		ISOK	Homeless Alliance	No	ISOK-TE-1	Yes	ISOK-TE-6	Yes
Temporary Emergency Shelter	Mental Health Association Oklahoma	Homeless Alliance	Alliance- Willard Emergency Shelter (ES)(ESG-CV) (12312)	Y	1/1/2021	4/30/2021	ISOK	Homeless Alliance	No			ISOK-TE-4	Yes

**CUMULATIVE Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	7	4140	3683
Day Shelter	1	2244	1611
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>8</b>	<b>6384</b>	<b>5294</b>
Total Street Outreach	1	71	64
Total PH - Rapid Re-Housing	4	537	332
Total Homelessness Prevention	6	1688	736

**QUARTERLY Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	4	2062	1661
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>4</b>	<b>2062</b>	<b>1661</b>
Total Street Outreach	1	30	27
Total PH - Rapid Re-Housing	4	397	248
Total Homelessness Prevention	5	248	97

**Narrative for Projects Missing on Previous Submission**

1	5893912	102589	115296	106606	1	296	0
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**Information on Allowable Activities**

1	6012143	102589	115296	106606	1	291	0
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**Financial Information**

1	6021672	102589	115296	106606	1	288	0
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**Contact Information**

1	6012145	102589	115296	106606	1	287	0
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**Additional Comments**

- no data -

**HUD ESG-CV**  
 Filters for this report  
 Client ID 102589  
 Q4a record ID (all)  
 Submission ID 115658  
 Report executed on 10/4/2022 5:59:42 PM

**Report Date Range**  
 4/1/2022 to 6/30/2022

**Report first submitted to HUD on**  
 7/29/2022

**Reporting Requirements Identified**  
 Have you executed your ESG-CV Grant Agreement? **Yes**  
 Have you made any expenditures? **Yes**  
**HMIS, Admin, Landlord Incentives, Temporary Emergency Shelter, Emergency Shelter, Street Outreach, Rapid Re-Housing, Homelessness Prevention**  
 Identify the expenditures made to date

**HMIS/VSP Contacts Identified**

Organization	HMIS/VSP ID	VSP?	Contact Name	Contact Email	Contact Phone
Homeless Alliance	ISOK	No	Keith Anderson	hmis@isok.biz	9188526819

**Project and Bundle List**

Component Type	Subrecipient	Sub-subrecipient	Project Name	Carried Forward?	Start Date	End Date	HMIS ID	HMIS Full Name	VSP?	Bundle - Quarterly	Bundle Sent?	Bundle - Cumulative	Bundle Sent?
Emergency Shelter (CV)	City Care		Night Shelter (ESG-CV)	N	1/1/2022		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-7	Yes
Emergency Shelter (CV)	City Rescue Mission		CRM - Emergency Shelter (ESG-CV)	N	5/1/2022		ISOK	Homeless Alliance	No	ISOK-ES-CV-2	Yes	ISOK-ES-CV-9	Yes
Emergency Shelter (CV)	Homeless Alliance		HA-COVID 19 ESG Entries Day Shelter (ES)(ESG-CV)(12320)	Y	11/1/2021	3/31/2022	ISOK	Homeless Alliance	No			ISOK-ES-CV-6	Yes
Emergency Shelter (CV)	Homeless Alliance		Alliance- OKC Day Shelter (11520)	Y	2/1/2021	6/30/2021	ISOK	Homeless Alliance	No			ISOK-ES-CV-4	Yes
Emergency Shelter (CV)	Pivot		Extended Hours Drop-In (ESG-CV)	N	4/1/2022		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-8	Yes
Emergency Shelter (CV)	Salvation Army		Emergency Shelter (ESG-CV)	N	10/1/2021		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-5	Yes
Emergency Shelter (CV)	SISU Youth		SISU-Emergency Shelter (ES) (ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-ES-CV-1	Yes	ISOK-ES-CV-3	Yes
Homelessness Prevention	Catholic Charities		Catholic Charities OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Homeless Alliance		HA- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
Homelessness Prevention	Legal Aid Services of Oklahoma		Legal Aid OKC- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020	9/30/2021	ISOK	Homeless Alliance	No			ISOK-HP-2	Yes
Homelessness Prevention	Neighborhood Services Organization		NSO- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	10/1/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-4	Yes
Homelessness Prevention	Positive Tomorrows		Pos Tom- Homeless Prevention (HP)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-5	Yes
Homelessness Prevention	Upward Transitions		Upward- COVID 19 ESG Prevention (HP)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-HP-1	Yes	ISOK-HP-3	Yes
PH - Rapid Re-Housing	City Rescue Mission		CRM- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Homeless Alliance		HA-COVID 19 ESG RRH (RRH)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-2	Yes
PH - Rapid Re-Housing	Neighborhood Services Organization		NSO - Rapid Re-Housing (ESG-CV)	N	4/1/2022		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-4	Yes
PH - Rapid Re-Housing	Pivot		Pivot- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
PH - Rapid Re-Housing	Positive Tomorrows		Pos Tom- Rapid Re-Housing (RRH)(ESG-CV)	Y	4/1/2021		ISOK	Homeless Alliance	No	ISOK-RRH-1	Yes	ISOK-RRH-3	Yes
Street Outreach	Homeless Alliance		HA-COVID 19 ESG Street Outreach (Out)(ESG-CV)	Y	3/15/2020		ISOK	Homeless Alliance	No	ISOK-SO-1	Yes	ISOK-SO-2	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	8/1/2021		ISOK	Homeless Alliance	No	ISOK-TE5-1	Yes	ISOK-TE5-6	Yes
Temporary Emergency Shelter	Homeless Alliance		HA- COVID 19 ESG Emergency (ES)(ESG-CV)	Y	3/15/2020	9/30/2020	ISOK	Homeless Alliance	No			ISOK-TE5-3	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	Y	11/1/2021	3/31/2022	ISOK	Homeless Alliance	No			ISOK-TE5-7	Yes
Temporary Emergency Shelter	Homeless Alliance		Alliance- Night Shelter (ES) (12295)	Y	10/1/2020	1/31/2021	ISOK	Homeless Alliance	No			ISOK-TE5-4	Yes
Temporary Emergency Shelter	Mental Health Association Oklahoma	Homeless Alliance	Alliance- Willard Emergency Shelter (ES)(ESG-CV) (12312)	Y	1/1/2021	4/30/2021	ISOK	Homeless Alliance	No			ISOK-TE5-5	Yes
Temporary Emergency Shelter	Pivot		Hotel/Motel Voucher (ESG-CV)	N	5/1/2022		ISOK	Homeless Alliance	No	ISOK-TE5-2	Yes	ISOK-TE5-8	Yes

**CUMULATIVE Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	12	6667	5923
Day Shelter	1	2244	1611
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>13</b>	<b>8911</b>	<b>7534</b>
Total Street Outreach	1	82	71
Total PH - Rapid Re-Housing	5	630	391
Total Homelessness Prevention	6	1843	805

**QUARTERLY Projects carried out during the program year (according to files that have been uploaded)**

Components	Projects	Total Persons Reported	Total Households Reported
Emergency Shelter/Temporary Emergency Shelter	7	1513	1318
Transitional Housing	0	0	0
<b>Total Emergency Shelter Component</b>	<b>7</b>	<b>1513</b>	<b>1318</b>
Total Street Outreach	1	26	20
Total PH - Rapid Re-Housing	5	384	245
Total Homelessness Prevention	5	349	141

**Narrative for Projects Missing on Previous Submission**

1	6662033	102589	115658	106606	1	296	0
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**Information on Allowable Activities**

1	6532446	102589	115658	106606	1	291	0
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**Financial Information**

1	6534184	102589	115658	106606	1	288	0
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**Contact Information**

1	6662034	102589	115658	106606	1	287	0
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**Additional Comments**  
 - no data -

# APPENDIX 6

## MATCH SUMMARY REPORT



# HOME Match Report

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

OMB Approval No. 2506-0171  
(exp. 05/31/2007)

Match Contributions for  
**Federal Fiscal Year (yyyy)**

## Part I Participant Identification

1. Participant No. (assigned by HUD)	2. Name of the Participating Jurisdiction		3. Name of Contact (person completing this report)		
5. Street Address of the Participating Jurisdiction				4. Contact's Phone Number (include area code)	
6. City	7. State	8. Zip Code			

## Part II Fiscal Year Summary

1. Excess match from prior Federal fiscal year	\$	
2. Match contributed during current Federal fiscal year (see Part III.9.)	\$	
3. Total match available for current Federal fiscal year (line 1 + line 2)		\$
4. Match liability for current Federal fiscal year		\$
5. Excess match carried over to next Federal fiscal year (line 3 minus line 4)		\$

## Part III Match Contribution for the Federal Fiscal Year

1. Project No. or Other ID	2. Date of Contribution (mm/dd/yyyy)	3. Cash (non-Federal sources)	4. Foregone Taxes, Fees, Charges	5. Appraised Land / Real Property	6. Required Infrastructure	7. Site Preparation, Construction Materials, Donated labor	8. Bond Financing	9. Total Match

Name of the Participating Jurisdiction								Federal Fiscal Year (yyyy)
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1. Project No. or Other ID	2. Date of Contribution (mm/dd/yyyy)	3. Cash (non-Federal sources)	4. Foregone Taxes, Fees, Charges	5. Appraised Land / Real Property	6. Required Infrastructure	7. Site Preparation, Construction Materials, Donated labor	8. Bond Financing	9. Total Match

Public reporting burden for this collection of information is estimated to average 45 minutes 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.

## Instructions for the HOME Match Report

### Applicability:

The HOME Match Report is part of the HOME APR and must be filled out by every participating jurisdiction that incurred a match liability. Match liability occurs when FY 1993 funds (or subsequent year funds) are drawn down from the U.S. Treasury for HOME projects. A Participating Jurisdiction (PJ) may start counting match contributions as of the beginning of Federal Fiscal Year 1993 (October 1, 1992). A jurisdiction not required to submit this report, either because it did not incur any match or because it had a full match reduction, may submit a HOME Match Report if it wishes. The match would count as excess match that is carried over to subsequent years. The match reported on this form must have been contributed during the reporting period (between October 1 and September 30).

### Timing:

This form is to be submitted as part of the HOME APR on or before December 31. The original is sent to the HUD Field Office. One copy is sent to the

Office of Affordable Housing Programs, CGHF  
Room 7176, HUD, 451 7th Street, S.W.  
Washington, D.C. 20410.

The participating jurisdiction also keeps a copy.

### Instructions for Part II:

1. **Excess match from prior Federal fiscal year:** Excess match carried over from prior Federal fiscal year.
2. **Match contributed during current Federal fiscal year:** The total amount of match contributions for all projects listed under Part III in column 9 for the Federal fiscal year.

3. **Total match available for current Federal fiscal year:** The sum of excess match carried over from the prior Federal fiscal year (Part II, line 1) and the total match contribution for the current Federal fiscal year (Part II, line 2). This sum is the total match available for the Federal fiscal year.

4. **Match liability for current Federal fiscal year:** The amount of match liability is available from HUD and is provided periodically to PJs. The match must be provided in the current year. The amount of match that must be provided is based on the amount of HOME funds drawn from the U.S. Treasury for HOME projects. The amount of match required equals 25% of the amount drawn down for HOME projects during the Federal fiscal year. Excess match may be carried over and used to meet match liability for subsequent years (see Part II line 5). Funds drawn down for administrative costs, CHDO operating expenses, and CHDO capacity building do not have to be matched. Funds drawn down for CHDO seed money and/or technical assistance loans do not have to be matched if the project does not go forward. A jurisdiction is allowed to get a partial reduction (50%) of match if it meets one of two statutory distress criteria, indicating "fiscal distress," or else a full reduction (100%) of match if it meets both criteria, indicating "severe fiscal distress." The two criteria are poverty rate (must be equal to or greater than 125% of the average national family poverty rate to qualify for a reduction) and per capita income (must be less than 75% of the national average per capita income to qualify for a reduction). In addition, a jurisdiction can get a full reduction if it is declared a disaster area under the Robert T. Stafford Disaster Relief and Emergency Act.

5. **Excess match carried over to next Federal fiscal year:** The total match available for the current Federal fiscal year (Part II, line 3) minus the match liability for the current Federal fiscal year (Part II, line 4). Excess match may be carried over and applied to future HOME project match liability.

### Instructions for Part III:

1. **Project No. or Other ID:** "Project number" is assigned by the C/MI System when the PJ makes a project setup call. These projects involve at least some Treasury funds. If the HOME project does not involve Treasury funds, it must be identified with "other ID" as follows: the fiscal year (last two digits only), followed by a number (starting from "01" for the first non-Treasury-funded project of the fiscal year), and then at least one of the following abbreviations: "SF" for project using shortfall funds, "PI" for projects using program income, and "NON" for non-HOME-assisted affordable housing. Example: 93.01.SF, 93.02.PI, 93.03.NON, etc.

Shortfall funds are non-HOME funds used to make up the difference between the participation threshold and the amount of HOME funds allocated to the PJ; the participation threshold requirement applies only in the PJ's first year of eligibility. [§92.102]

Program income (also called "repayment income") is any return on the investment of HOME funds. This income must be deposited in the jurisdiction's HOME account to be used for HOME projects. [§92.503(b)]

Non-HOME-assisted affordable housing is investment in housing not assisted by HOME funds that would qualify as “affordable housing” under the HOME Program definitions. “NON” funds must be contributed to a specific project; it is not sufficient to make a contribution to an entity engaged in developing affordable housing. [§92.219(b)]

2. **Date of Contribution:** Enter the date of contribution. Multiple entries may be made on a single line as long as the contributions were made during the current fiscal year. In such cases, if the contributions were made at different dates during the year, enter the date of the last contribution.
3. **Cash:** Cash contributions from non-Federal resources. This means the funds are contributed permanently to the HOME Program regardless of the form of investment the jurisdiction provides to a project. Therefore all repayment, interest, or other return on investment of the contribution must be deposited in the PJ’s HOME account to be used for HOME projects. The PJ, non-Federal public entities (State/local governments), private entities, and individuals can make contributions. The grant equivalent of a below-market interest rate loan to the project is eligible when the loan is not repayable to the PJ’s HOME account. [§92.220(a)(1)] In addition, a cash contribution can count as match if it is used for eligible costs defined under §92.206 (except administrative costs and CHDO operating expenses) or under §92.209, or for the following non-eligible costs: the value of non-Federal funds used to remove and relocate ECHO units to accommodate eligible tenants, a project reserve account for replacements, a project reserve account for unanticipated increases in operating costs, operating subsidies, or costs relating to the portion of a mixed-income or mixed-use project not related to the affordable housing units. [§92.219(c)]
4. **Foregone Taxes, Fees, Charges:** Taxes, fees, and charges that are normally and customarily charged but have been waived, foregone, or deferred in a manner that achieves affordability of the HOME-assisted housing. This includes State tax credits for low-income housing development. The amount of real estate taxes may be based on the

post-improvement property value. For those taxes, fees, or charges given for future years, the value is the present discounted cash value. [§92.220(a)(2)]

5. **Appraised Land/Real Property:** The appraised value, before the HOME assistance is provided and minus any debt burden, lien, or other encumbrance, of land or other real property, not acquired with Federal resources. The appraisal must be made by an independent, certified appraiser. [§92.220(a)(3)]
6. **Required Infrastructure:** The cost of investment, not made with Federal resources, in on-site and off-site infrastructure directly required for HOME-assisted affordable housing. The infrastructure must have been completed no earlier than 12 months before HOME funds were committed. [§92.220(a)(4)]
7. **Site preparation, Construction materials, Donated labor:** The reasonable value of any site-preparation and construction materials, not acquired with Federal resources, and any donated or voluntary labor (see §92.354(b)) in connection with the site-preparation for, or construction or rehabilitation of, affordable housing. The value of site-preparation and construction materials is determined in accordance with the PJ’s cost estimate procedures. The value of donated or voluntary labor is determined by a single rate (“labor rate”) to be published annually in the Notice Of Funding Availability (NOFA) for the HOME Program. [§92.220(6)]
8. **Bond Financing:** Multifamily and single-family project bond financing must be validly issued by a State or local government (or an agency, instrumentality, or political subdivision thereof). 50% of a loan from bond proceeds made to a multifamily affordable housing project owner can count as match. 25% of a loan from bond proceeds made to a single-family affordable housing project owner can count as match. Loans from all bond proceeds, including excess bond match from prior years, may not exceed 25% of a PJ’s total annual match contribution. [§92.220(a)(5)] The amount in excess of the 25% cap for bonds may carry over, and the excess will count as part of the statutory limit of up to 25% per year. Requirements regarding

bond financing as an eligible source of match will be available upon publication of the implementing regulation early in FY 1994.

9. **Total Match:** Total of items 3 through 8. This is the total match contribution for each project identified in item 1.

**Ineligible forms of match include:**

1. Contributions made with or derived from Federal resources e.g. CDBG funds [§92.220(b)(1)]
2. Interest rate subsidy attributable to the Federal tax-exemption on financing or the value attributable to Federal tax credits [§92.220(b)(2)]
3. Contributions from builders, contractors or investors, including owner equity, involved with HOME-assisted projects. [§92.220(b)(3)]
4. Sweat equity [§92.220(b)(4)]
5. Contributions from applicants/recipients of HOME assistance [§92.220(b)(5)]
6. Fees/charges that are associated with the HOME Program only, rather than normally and customarily charged on all transactions or projects [§92.220(a)(2)]
7. Administrative costs

U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System  
 Home Matching Liability Report

OKLAHOMA CITY, OK

Fiscal Year	Match Percent	Total Disbursements	Disbursements Requiring Match	Match Liability Amount
1997	25.0%	\$16,840.23	\$16,840.23	\$4,210.05
1998	25.0%	\$1,892,091.80	\$1,720,906.72	\$430,226.68
1999	0.0%	\$2,356,757.46	\$0.00	\$0.00
2000	0.0%	\$2,702,095.18	\$0.00	\$0.00
2001	0.0%	\$2,683,740.38	\$0.00	\$0.00
2002	0.0%	\$2,467,516.01	\$0.00	\$0.00
2003	0.0%	\$2,581,200.20	\$0.00	\$0.00
2004	0.0%	\$3,251,373.42	\$0.00	\$0.00
2005	12.5%	\$3,217,946.22	\$2,850,449.60	\$356,306.20
2006	0.0%	\$3,288,773.19	\$0.00	\$0.00
2007	0.0%	\$3,256,369.08	\$0.00	\$0.00
2008	0.0%	\$2,133,971.76	\$0.00	\$0.00
2009	0.0%	\$3,143,101.68	\$0.00	\$0.00
2010	0.0%	\$3,885,245.87	\$0.00	\$0.00
2011	0.0%	\$2,433,053.43	\$0.00	\$0.00
2012	12.5%	\$2,080,964.65	\$1,877,637.85	\$234,704.73
2013	0.0%	\$2,130,245.11	\$0.00	\$0.00

U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System  
 Home Matching Liability Report

2014	0.0%	\$1,917,939.77	\$0.00	\$0.00
2015	0.0%	\$2,723,654.26	\$0.00	\$0.00
2016	0.0%	\$2,133,555.12	\$0.00	\$0.00
2017	0.0%	\$3,183,045.99	\$0.00	\$0.00
2018	25.0%	\$2,207,381.11	\$1,893,997.34	\$473,499.33
2019	25.0%	\$976,158.84	\$746,033.13	\$186,508.28
2020	0.0%	\$2,414,123.06	\$0.00	\$0.00
2021	0.0%	\$1,108,956.71	\$0.00	\$0.00

**From:** [HUD Exchange Mailing List](#)  
**To:** [Stallings, Mark R](#)  
**Subject:** FY 2021 HOME Match Reductions Published  
**Date:** Friday, July 30, 2021 11:10:56 AM

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# FY 2021 HOME Match Reductions Published

The [FY 2021 HOME Match Reductions](#) list has been published and includes match reductions granted for FY 2021 due to fiscal distress, severe fiscal distress, Presidential disaster declarations, and reductions requested by HOME Participating Jurisdictions (PJs) due to the COVID-19 pandemic. These match reductions were made available to affected states and local jurisdictions through [CPD Memo: Availability of Waivers and Suspensions of the HOME Program Requirements in Response to COVID-19 Pandemic](#), dated April 10, 2020. For those PJs with fiscal distress and Presidential disaster match reductions, the PJ may take the higher match reduction for the current fiscal year. PJs that requested a match reduction under the COVID-19 waiver received 100 percent reduction of their match liabilities for fiscal years 2020 and 2021.

**Note:** Since match reductions due to major Presidential disaster declarations are requested by PJs and granted by field offices at any time during the fiscal year, this list will be updated as needed.

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Visit the [HOME Program page](#) on the HUD Exchange for program guidance, tools, trainings, reports, and other resources for the HOME Program.



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Excel FY-2021-HOME-Match-Reductions - Saved Search (Alt + Q)

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Participating Jurisdiction/State	Sta	% Pover (≥17.968%)	\$PCI (<\$24,306)	% PI Growth	Fisc Distress	President Disaster*	COVID 19							
451	Lawton	OK	17.79%	\$23,819		50%									
452	Norman	OK	18.49%	\$30,448		50%									
453	Oklahoma	OK	16.38%	\$25,523	1.80%	50%									
454	Oklahoma City	OK	16.75%	\$29,580				100%							
455	Tulsa	OK	19.68%	\$29,766		50%		100%							
456	Tulsa County Consortium	OK	10.03%	\$30,603											
457	Clackamas County	OR	8.49%	\$39,571											
458	Eugene Consortium	OR	21.19%	\$27,455		50%		100%							
459	Marion County	OR	13.94%	\$26,545											
460	Oregon	OR	15.14%	\$27,812	2.70%			100%							
461	Portland Consortium	OR	15.13%	\$36,857											
462	Salem	OR	15.60%	\$26,423											
463	Washington County Consortium	OR	9.64%	\$37,692				100%							
464	Allegheny County Consortium	PA	9.29%	\$38,542				100%							
465	Allentown	PA	26.16%	\$20,235		100%									
466	Altoona	PA	22.74%	\$22,995		100%									
467	Beaver County	PA	10.97%	\$30,064											
468	Berks County	PA	6.71%	\$34,402											
469	Bethlehem	PA	16.07%	\$28,805											
470	Bucks County Consortium	PA	6.05%	\$44,103				100%							
471	Chester	PA	33.62%	\$16,040		100%									
472	Chester County	PA	6.79%	\$48,225				100%							
473	Cumberland County	PA	6.78%	\$36,487				100%							
474	Dauphin County	PA	9.38%	\$34,816											
475	Delaware County	PA	8.22%	\$41,030				100%							
476	Erie	PA	26.39%	\$20,955		100%									

**APPENDIX 7**  
**SECTION 3 REPORT**

## CR-58 – Section 3

Identify the number of individuals assisted and the types of assistance provided

Total Labor Hours	CDBG	HOME	ESG	HOPWA	HTF
Total Number of Activities	3	3	0	0	0
Total Labor Hours	9100	4554			
Total Section 3 Worker Hours	4452	3426			
Total Targeted Section 3 Worker Hours	1338	1742			

**Table 1 – Total Labor Hours**

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers	1				
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.	1	1			
Technical assistance to help Section 3 business concerns understand and bid on contracts.		2			
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.					
Held one or more job fairs.	1	1			
Provided or connected residents with supportive services that can provide direct services or referrals.					
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.	1	1			
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

**Table 2 – Qualitative Efforts - Number of Activities by Program**



# APPENDIX 8

## MONITORING SUMMARY

1st Inspection	Reinspection	Contacted	Document	Pass	Title	Address	UNIT	City	State	Zip	INSP	TYPE	Date Scheduled	Summary	Item Type	Path
Done	Done	TRUE	<a href="#">1515 NE 48th St 102</a>	TRUE	Temple Gardens	1515 NE 48th St	102	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1515 NE 48th St 108</a>	TRUE	Temple Gardens	1515 NE 48th St	108	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1515 NE 48th St 111</a>	TRUE	Temple Gardens	1515 NE 48th St	111	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1515 NE 48th St 117</a>	TRUE	Temple Gardens	1515 NE 48th St	117	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1515 NE 48th St 118</a>	TRUE	Temple Gardens	1515 NE 48th St	118	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">1515 NE 48th St 120</a>	FALSE	Temple Gardens	1515 NE 48th St	120	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1515 NE 48th St 204</a>	TRUE	Temple Gardens	1515 NE 48th St	204	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1515 NE 48th St 208</a>	TRUE	Temple Gardens	1515 NE 48th St	208	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">1515 NE 48th St 215</a>	TRUE	Temple Gardens	1515 NE 48th St	215	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">1515 NE 48th St 225</a>	TRUE	Temple Gardens	1515 NE 48th St	225	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">2421 NW 4th St C</a>	TRUE	Westlawn Gardens Supportive housing	2421 NW 4th St	Unit #C	OKLAHOMA CITY	OK	73107	HQS	MF Apts.	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">2421 NW 4th St Unit G</a>	TRUE	Westlawn Gardens Supportive housing	2421 NW 4th St	Unit#G	OKLAHOMA CITY	OK	73107	HQS	MF Apts.	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">2313 NW 2nd St</a>	TRUE	Westlawn SFR	2313 NW 2nd St	NA	OKLAHOMA CITY	OK	73107	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	FALSE	<a href="#">308 N Tuttle St</a>	TRUE	Westlawn SFR	308 N Tuttle St	NA	OKLAHOMA CITY	OK	73107	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">2433 W Main St</a>	TRUE	Westlawn SFR	2433 W Main St	NA	OKLAHOMA CITY	OK	73107	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">321 SE 37th St</a>	TRUE	37th St Duplex	321 SE 37th St	NA	OKLAHOMA CITY	OK	73129	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">323 SE 37th St</a>	TRUE	37th St Duplex	323 SE 37th St	NA	OKLAHOMA CITY	OK	73129	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">2349 W Lindley Ave</a>	TRUE	Westlawn Gardens Duplexes	2349 W Lindley Ave	NA	OKLAHOMA CITY	OK	73107	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	To Schedule	TRUE	<a href="#">2351 W Lindley Ave</a>	TRUE	Westlawn Gardens Duplexes	2351 W Lindley Ave	NA	OKLAHOMA CITY	OK	73107	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">2225 NW 2nd St A</a>	TRUE	Westlawn Gardens Duplexes	2225 NW 2nd St	A	OKLAHOMA CITY	OK	73107	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">2506 Urban League Ct</a>	TRUE	Capitol Square	2506 Urban League Ct	NA	OKLAHOMA CITY	OK	73105	HQS	Duplex	8/24/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">3812 N Kelley Ave</a>	TRUE	Mt. Olive Sr. Cottages	3812 N Kelley Ave	A	OKLAHOMA CITY	OK	73111	HQS	Sr. Apts.	8/24/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">401 NW 11th St 104</a>	TRUE	Palo Duro II	401 NW 11th St	104	OKLAHOMA CITY	OK	73103	HQS	Supportive hsg. mentally ill/homeless	8/25/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	FALSE	<a href="#">401 NW 11th St 106</a>	TRUE	Palo Duro II	401 NW 11th St	106	OKLAHOMA CITY	OK	73103	HQS	Supportive hsg. mentally ill/homeless	8/25/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">401 NW 11th St 206</a>	TRUE	Palo Duro II	401 NW 11th St	206	OKLAHOMA CITY	OK	73103	HQS	Supportive hsg. mentally ill/homeless	8/25/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1105 NW 11th St</a>	TRUE	NSO Duplex	1105 NW 11th St	both units	OKLAHOMA CITY	OK	73103	HQS	Duplex	8/30/2021 13:30		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1105 1/2 NW 11th St</a>	TRUE	NSO Duplex	1105 1/2 NW 11th St	both units	OKLAHOMA CITY	OK	73103	HQS	Duplex	8/30/2021 13:30		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1516 NE 16th St</a>	TRUE	CEC Scattered Site 2	1516 NE 16th St	NA	OKLAHOMA CITY	OK	73117	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1604 NE 9th St</a>	TRUE	CEC Scattered Site 2	1604 NE 9th St	NA	OKLAHOMA CITY	OK	73117	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1333 NE 16th St</a>	TRUE	CEC Scattered Site 2	1333 NE 16th St	NA	OKLAHOMA CITY	OK	73117	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">740 NW 114th St</a>	TRUE	CEC Scattered Site 1	740 NW 114th St	Unit A	OKLAHOMA CITY	OK	73114	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">803 NW 111th St</a>	TRUE	CEC Scattered Site 1	803 NW 111th St	Unit A	OKLAHOMA CITY	OK	73114	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Hallway floor is cracked and is a tripping hazard.																
Done	To Schedule	TRUE	<a href="#">613 NW 88th St</a>	FALSE	CEC Scattered Site 1	613 NW 88th St	Unit A	OKLAHOMA CITY	OK	73114	HQS	SFR	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1200 NE 37th St</a>	TRUE	CEC Scattered Site 1	1200 NE 37th St	Unit A	OKLAHOMA CITY	OK	73111	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">2124 N MLK Ave</a>	TRUE	CEC Scattered Site 1	2124 N MLK Ave	Unit A	OKLAHOMA CITY	OK	73111	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">2126 N MLK Ave</a>	TRUE	CEC Scattered Site 1	2126 N MLK Ave	Unit A	OKLAHOMA CITY	OK	73111	HQS	Duplex	8/26/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1305 NE 16th St</a>	TRUE	Allen Chapel	1305 NE 16th St	NA	OKLAHOMA CITY	OK	73117	HQS	Duplex	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
Done	Done	TRUE	<a href="#">1309 NE 16th St</a>	TRUE	Allen Chapel	1309 NE 16th St	NA	OKLAHOMA CITY	OK	73117	HQS	Duplex	8/23/2021 0:00		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned
<ul style="list-style-type: none"> <li>Lead based paint peeling, chipping, and loose paint or adequately treated (all painted surfaces throughout</li> <li>Mold and mildew present in laundry room Ceiling</li> <li>Heavy wasp infestation around the house.</li> <li>Stored items in doorway and stairwells areas.</li> <li>Tree limbs in contact with roof decking.</li> <li>Chimney brick is loose and missing at the top.</li> <li>Gutters are dirty and clogged.</li> <li>Roof ridge shingles are damaged and missing.</li> <li>Exterior window trim paint and caulk is cracking, peeling, chipping, and loose paint or adequately treated (all painted surfaces throughout exterior)</li> <li>Water leak behind brick siding above laundry room window,</li> <li>Handrail and guardrails missing to surfaces over 2 feet high.</li> <li>Smoke and CO2 detectors missing or inoperable (throughout)</li> <li>Stored items in doorway areas.</li> <li>Water stains on ceiling.</li> <li>Missing draw handles and pulls.</li> <li>Backsplash does not extend to the bottom of the cabinets.</li> <li>Kitchen counter tops deteriorated.</li> </ul>																
Done	To Schedule	TRUE	<a href="#">1412 NW 17th St</a>	FALSE	L.A. Bross Investments	1412 NW 17th St	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/31/2021 14:00	Windows are inoperable. (Throughout)	Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties units assigned

Done	To Schedule	TRUE	<a href="#">1412 1/2 NW 17th St</a>	FALSE	L.A. Gross Investments	1412 1/2 NW 17th St	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/31/2021 14:00	Lead based paint peeling, chipping, and loose paint or adequately treated (all painted surfaces throughout) Mold and mildew present in Basement Exposed wire connections and open junction box in the basement. Stored items in doorway and stairwells areas. Smoke and CO2 detectors missing or inoperable (throughout) Stored items in doorway areas. Water stains on ceiling. Missing draw handles and pulls. Backsplash does not extend to the bottom of the cabinets. Kitchen counter tops deteriorated. Windows are inoperable. (Throughout)	Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned	
To Do				FALSE	Lenardo Smith	2121 Glen Elyn St	NA	OKLAHOMA CITY	OK	73111	HQS	SFR				Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
To Do				FALSE	Lenardo Smith	2108 NE 15th St	NA	OKLAHOMA CITY	OK	73117	HQS	SFR				Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
To Do				FALSE	Lenardo Smith	1101 Campbell Rd	NA	OKLAHOMA CITY	OK	73111	HQS	SFR				Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
To Do				FALSE	Lenardo Smith	1405 NE 34th St	NA	OKLAHOMA CITY	OK	73111	HQS	SFR				Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE		TRUE	Struble Properties	1612 N Marion Ave	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE	<a href="#">1614 N Marion Ave</a>	TRUE	Struble Properties	1614 N Marion Ave	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE	<a href="#">1117 NW 15th St</a>	TRUE	Struble Properties	1117 NW 15th St	NA	OKLAHOMA CITY	OK	73106	HQS	SFR	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done		<a href="#">1127 NW 15th St</a>	TRUE	Struble Properties	1127 NW 15th St.	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE	<a href="#">1129 NW 29th St</a>	TRUE	Struble Properties	1129 NW 15th St.	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE	<a href="#">1131 NW 15th St</a>	TRUE	Struble Properties	1131 NW 15th St	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	To Schedule	TRUE	<a href="#">1131 1/2 NW 15th St</a>	TRUE	Struble Properties	1131 1/2 NW 15th St	NA	OKLAHOMA CITY	OK	73106	HQS	Duplex	8/25/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	To Schedule	TRUE	<a href="#">2916 NE 31st St</a>	TRUE	CUDI Forest Village Estates	2916 NE 31st St	2916	OKLAHOMA CITY	OK	73121	UPCS	Sr. Duplexes	8/31/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	To Schedule	TRUE	<a href="#">3202 Kitty Ct</a>	TRUE	CUDI Forest Village Estates	3202 Kitty Ct	3202	OKLAHOMA CITY	OK	73121	UPCS	Sr. Duplexes	8/31/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	To Schedule	TRUE	<a href="#">3224 Kitty Ct</a>	TRUE	CUDI Forest Village Estates	3224 Kitty Ct	3224	OKLAHOMA CITY	OK	73121	UPCS	Sr. Duplexes	8/31/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	To Schedule	TRUE	<a href="#">3211 Kitty Ct</a>	TRUE	CUDI Forest Village Estates	3211 Kitty Ct	3211	OKLAHOMA CITY	OK	73121	UPCS	Sr. Duplexes	8/31/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	To Schedule	TRUE	<a href="#">1912 NE 7th St</a>	FALSE	CUDI Fairgrounds	1912 NE 7th St	1912	OKLAHOMA CITY	OK	73117	HQS	MF Apts.	9/2/2021 11:00	The exterior siding at the south side missing/damaged/not secure on second story.		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done			<a href="#">1724 NW 4th St 5</a>	TRUE	WestTown Apartments	1724 NW 4th St	Unit #5	OKLAHOMA CITY	OK	73106	UPCS	SRO	8/24/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done			<a href="#">1724 NW 4th St 11</a>	TRUE	WestTown Apartments	1724 NW 4th St	Unit #11	OKLAHOMA CITY	OK	73106	UPCS	SRO	8/24/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE	<a href="#">1724 NW 4th St 13</a>	TRUE	WestTown Apartments	1724 NW 4th St	Unit #13	OKLAHOMA CITY	OK	73106	UPCS	SRO	8/24/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Done	TRUE	<a href="#">1724 NW 4th St 18</a>	TRUE	WestTown Apartments	1724 NW 4th St	Unit #18	OKLAHOMA CITY	OK	73106	UPCS	SRO	8/24/2021 0:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done	Scheduled	TRUE	<a href="#">1123 NE 19th St</a>	FALSE	Neighborhood Housing Services	1123 NE 19th St	NA	OKLAHOMA CITY	OK	73111	HQS	SFR	8/20/2021 0:00	Wood rot on all exterior window paint and all trim.West Stair case handrails is not secured and the handrail is damaged.		Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done			<a href="#">11601 W Stanley Draper Dr 1</a>	TRUE	Firststep Men's Lodge	11601 W Stanley Draper Dr	Unit #1	OKLAHOMA CITY	OK	73165	UPCS	SRO	9/8/2021 10:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done			<a href="#">11601 W Stanley Draper Dr 5</a>	TRUE	Firststep Men's Lodge	11602 W Stanley Draper Dr	Unit #5	OKLAHOMA CITY	OK	73165	UPCS	SRO	9/8/2021 10:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done			<a href="#">11601 W Stanley Draper Dr 7</a>	TRUE	Firststep Men's Lodge	11603 W Stanley Draper Dr	Unit #7	OKLAHOMA CITY	OK	73165	UPCS	SRO	9/8/2021 10:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned
Done			<a href="#">11601 W Stanley Draper Dr 12</a>	TRUE	Firststep Men's Lodge	11604 W Stanley Draper Dr	Unit #12	OKLAHOMA CITY	OK	73165	UPCS	SRO	9/8/2021 10:00			Item	sites/PL-HOMERentalInspections/Lists/HOME Assisted Rental Properties	units assigned

## **Incomplete inspection items as of June 30, 2022**

65 units were inspected. There are 15 units with repairs that need to be completed.

Following is a list of the properties with incomplete repairs:

### **Temple Gardens:**

1. All package units in each unit need to be serviced and condensation lines and pans need to be free from blockage. (Provide completed work orders as evidence of completion.)
2. Missing and unsecured gutters on the north and south sides of the building.
3. Wood rot present on ledge trim throughout.
4. Siding paint is peeling and faded throughout.
5. Wood rot on soffit and bird box fascia on the North, West, and South sides of the building.
6. Caulking is peeling and cracking throughout the building.
7. Handrail on the west side of the front porch is not properly secured and has wood rot present.

### **CEC Scattered Site**

#### **613 NW 88th St**

1. Broken Window in the front room.
2. Trim around the window was damaged.
3. Back door frame and trim are damaged.
4. Hallway floor is cracked and is a tripping hazard.
5. Exterior siding and caulk need repainted and caulked.
6. Soffit is damaged on south side.
7. Soffit trim missing or unsecured throughout
8. Gutters damaged and missing throughout
9. Northwest fence is damaged.
10. Garage ceiling is unsecured
11. Garage was full of stored items

### **LA Cross Investment**

#### **1412 NW 17th Street**

1. Lead based paint peeling, chipping, and loose paint or adequately treated (all painted surfaces throughout)
2. Windows are inoperable. (Throughout)
3. Kitchen counter tops deteriorated.
4. Backsplash does not extend to the bottom of the cabinets.
5. Missing draw handles and pulls.
6. Water stains on ceiling.
7. Stored items in doorway areas.
8. Smoke and CO2 detectors missing or inoperable (throughout)
9. Handrail and guardrails missing to surfaces over 2 feet high.
10. Water leak behind brick siding above laundry room window,
11. Exterior window trim paint and caulk is cracking, peeling, chipping, and loose paint or adequately treated (all painted surfaces throughout exterior)
12. Roof ridge shingles are damaged and missing.
13. Gutters are dirty and clogged.
14. Chimney brick is loose and missing at the top.
15. Tree limbs in contact with roof decking.
16. Stored items in doorway and stairwells areas.



## **Incomplete inspection items as of June 30, 2022**

17. Heavy wasp infestation around the house.

18. Mold and mildew present in laundry room Ceiling

1412 1/2 NW 17th Street

1. Lead based paint peeling, chipping, and loose paint or adequately treated (all painted surfaces throughout)
2. Windows are inoperable. (Throughout)
3. Kitchen counter tops deteriorated.
4. Backsplash does not extend to the bottom of the cabinets.
5. Missing draw handles and pulls.
6. Water stains on ceiling.
7. Stored items in doorway areas.
8. Smoke and CO2 detectors missing or inoperable (throughout)
9. Stored items in doorway and stairwells areas.
10. Exposed wire connections and open junction box in the basement.
11. Mold and mildew present in Basement

**Lenardo Smith (No response for inspection) communications sent on 7/26/2021, 8/2/2021, 8/31/2021**

**2121 Glen Ellyn St**

**2108 NE 15th St**

**1101 Campbell Rd**

**1405 NE 34th St**

**CUDI Forest Village Estates / Fairgrounds**

**2916 NE 31st St.**

1. UPCS Inspection performed on exterior only. Interior could not be performed due to tenant being on COVID quarantine.
2. Ponding water next to property and erosion of soil needs to be corrected.
3. Deteriorated paint at rear entry door noted.

**3202 Kity Ct.**

1. Cabinet pulls missing at all cabinetries in home.
2. Crack in living room ceiling visible.
3. Exterior jamb and casing at rear entry door deteriorated.

**3211 Kity Ct.**

1. Baseboards deteriorated in master bedroom.
2. Paint deteriorated at rear entry
3. caulk needed at rear entry.

**3224 Kity Ct.**

1. Cabinet pulls missing at all cabinets in home.
2. Paint deterioration at rear entry.

**Neighborhood Housing Services**

**1123 NE 19th St**

1. Wood rot on all exterior window trim. Need replaced and painted.
2. West Staircase handrails is not secured, and the handrail is damaged. Handrails on both steps need to be replaced and secured.

# APPENDIX 9

## MBE/MWBE Reports

**Contract and Subcontract Activity-Community Development Block Grant**

**U.S. Department of Housing and Urban Development**

Public reporting burden for this collection of information is estimated to average .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. The Information is voluntary. HUD may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB Control Number.

Executive Orders dated July 14, 1983, directs the Minority Business Development Plans shall be developed by each Federal Agency and the these annual plans shall establish minority business development objectives. The information is used by HUD to monitor and evaluate MBE activities against the total program activity and the designated minority business enterprise (MBE) goals. The Department requires the information to provide guidance and oversight for programs for the development of minority business enterprise concerning Minority Business Development. If the information is not collected HUD would not be able to establish meaningful MBE goals nor evaluate MBE performance against these goals.

**Privacy Act Notice** = The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the Information requested in this form by virtue of Title 12, United States Code, Section 1701 et seq., and regulation. It will not be disclosed or relesed outside the United States Department of Housing and Urban Development without your consent, except as required or permitted by Law.

1. Grantee/Project Owner/Developer/Sponsor/Builder/Agency City of Oklahoma City	Check if:	2. Location (City, State Zip Code)
	<input type="checkbox"/> PH	420 W Main Street, Suite 920
	<input type="checkbox"/> IH	Oklahoma City, OK 73102
	<input type="checkbox"/> CPD	
	<input checked="" type="checkbox"/> Housing	

3a. Name of Contact Person Teresa Smith	3b. Phone Number (Including Area Code) 405-297-2380	4. Reporting Period July 1, 2021 - June 30, 2022 <input type="checkbox"/> F <input type="checkbox"/> A	Oct. 1 - Sept. 30 (Annual -	5. Program Code (Not applicable for CPD programs.) See explanation of Codes at bottom of Page Use a separate sheet for each program code.	6. Date Submitted to Field Office
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Number or HUD Case Number or other identification of property, subdivision, 7b.	Amount of Contract or Subcontract 7b.	Type of Trade Code (See below) 7c.	Contractor or Subcontractor Business Racial/Ethnic (See below) 7d.	Woman Owned Business (Yes or No) 7e.	Prime Contractor Identification (ID) Number 7f.	Sec. 3 7g.	Subcontractor Identification (ID) Number 7h.	Sec. 3 7i.	7j. Contractor/Subcontractor Name and Address					
									Name	Street	City	State	Zip	
B-21-MC-40-0003				No	73-0726103	No				Oklahoma City Urban Renewal Authority	105 N Hudson Ave Ste 101	Oklahoma City	OK	73102
B-21-MC-40-0003	\$46,115.00	3	1	Yes			80-0520159	No		Center for Economic Development Law	301 N Harvey, Ste 200	Oklahoma City	OK	73102
B-21-MC-40-0003	\$484,085.00	3	3	No			45-2034774	No		The Alliance for Economic Development of Oklahoma City	105 N Hudson Ave Ste 101	Oklahoma City	OK	73102
B-21-MC-40-0003	\$16,900.00	3	1	Yes			46-0472361	No		Summit holdings, dba Oklahoma Environmental Services	4415 N Classen Blvd	Oklahoma City	Ok	73118
B-21-MC-40-0003	\$13,500.00	3	1	No			20-5861398	No		HSPG & Associates	5400 N Grand Blvd, Suite 330	Oklahoma City	OK	73112
B-21-MC-40-0003	\$9,500.00	3	1	No			73-1568480	No		LM Ross	6604 Woodridge	Oklahoma City	OK	73132
B-21-MC-40-0003	\$600,000.00	3	1	YES	73-0753739	YES				Community Action Agency	319 S.W. 25th Street	Oklahoma City	OK	73109
B-21-MC-40-0003		3	1	NO			27-2116217	YES		A Better Construction	2501 Sandplum Drive	Edmond	OK	73003
B-21-MC-40-0003		3	1	NO			27-0878180	NO		Above All Plumbing	1709 S. Fritz Ste.103	Edmond	OK	73013
B-21-MC-40-0003		3	1	NO			445-42-7082	NO		Atlantis Heat & Air	P.O. Box 365	Blanchard	OK	73010
B-21-MC-40-0003		3	2	NO			27-3014107	YES		Crosby Construction	4120 Shadynook Way	Spencer	OK	73084
B-21-MC-40-0003		3	2	NO			43-1973620	YES		Good Guys Electric	5300 Chad Road	Oklahoma City	OK	73135
B-21-MC-40-0003		3	4	NO			81-1293148	NO		J. P. Construction & Roofing	4509 Texoma Place	Moore	OK	73165
B-21-MC-40-0003		3	1	NO			73-3172079	YES		Maverick Home Services	P.O. Box 2018	Oklahoma City	OK	73101
B-21-MC-40-0003		3	1	NO			73-1412373	YES		Payless Plumbing	1140 NW 92	Oklahoma City	OK	73113
B-21-MC-40-0003		3	2	NO			443-92-4256	YES		Russyl & Sons Mechanical	3805 S.E. 45	Oklahoma City	OK	73135
B-21-MC-40-0003	\$93,000.00	3	2	Y	73-1067333	N				Metropolitan Fair Housing	312 NE 28th Street, Suite 112	OKC	OK	73105
B-21-MC-40-0003	\$146,955.00	2	1	Y	455533265	N				Oklahoma Afterschool Network	PO Box 3085	OKC	OK	73101
B-21-MC-40-0003	\$92,935.00	2	2	N	736005359	N				Urban League of Greater OKC	3900 N MLK Ave	OKC	OK	73111
B-21-MC-40-0003	\$147,214.00	2	1	Y	731472202	N				Boys and Girls Club of OKC	3700 N Classen, Ste 125	OKC	OK	73118
B-21-MC-40-0003	\$495,000.00	1	1	N	736005359	N				Rudy Construction	PO Box 14575	OKC	OK	73113
B-21-MC-40-0003	\$132,600.50	3	2	Yes	47-4859802	No				Elite Level Construction & Design	377 Canterbury Rd.	Midwest City	OK	73130
B-21-MC-40-0003	\$10,312.30	3	2	No	81-1152210	No				GIG	1311 NW 85th St	Oklahoma City	OK	73114
B-21-MC-40-0003	\$115,769.00	3	2	No	45-5117327	No				Beyond Roofing & Construction	1209 SW 132nd	Oklahoma City	OK	73170
B-21-MC-40-0003	\$48,315.00	3	1	No	75-3172079	No				Maverick Home Services, Inc.	PO Box 2018	Oklahoma City	OK	73101



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Executive Orders dated July 14, 1983, directs the Minority Business Development Plans shall be developed by each Federal Agency and the these annual plans shall establish minority business development objectives. The information is used by HUD to monitor and evaluate MBE activities against the total program activity and the designated minority business enterprise (MBE) goals. The Department requires the information to provide guidance and oversight for programs for the development of minority business enterprise concerning Minority Business Development. If the information is not collected HUD would not be able to establish meaningful MBE goals nor evaluate MBE performance against these goals.

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Table with 2 main sections: 1. Grantee/Project Owner/Developer/Sponsor/Builder/Agency (City of Oklahoma City) and 2. Location (City, State Zip Code) (420 W Main Street Suite 920, Okla City, OK 73102). Includes checkboxes for PH, JH, CPD, and Housing.

Table with 6 sections: 3a. Name of Contact Person (Teresa Smith), 3b. Phone Number (405-297-2380), 4. Reporting Period (July 1, 2021 - June 30), 5. Program Code, and 6. Date Submitted to Field Office.

Main data table with columns for HUD Case Number, Amount of Contract, Type of Trade Code, Contractor or Subcontractor Business, Woman Owned Business, Prime Contractor Identification, Reporting Period, Subcontractor Identification, Contractor/Subcontractor Name and Address, City, State, and Zip. Contains numerous rows of project data.

**Contract and Subcontract Activity-Housing Opportunities for Persons With AIDS**

U.S. Department of Housing and Urban Development

OMB Approval No.: 2577-0088

OMB Approval No.: 2502-0355

Public reporting burden for this collection of information is estimated to average .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. The Information is voluntary. HUD may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB Control Number.

Executive Orders dated July 14, 1983, directs the Minority Business Development Plans shall be developed by each Federal Agency and the these annual plans shall establish minority business development objectives. The information is used by HUD to monitor and evaluate MBE activities against the total program activity and the designated minority business enterprise (MBE) goals. The Department requires the information to provide guidance and oversight for programs for the development of minority business enterprise concerning Minority Business Development. If the information is not collected HUD would not be able to establish meaningful MBE goals nor evaluate MBE performance against these goals.

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1. Grantee/Project Owner/Developer/Sponsor/Builder/Agency		Check if:		2. Location (City, State Zip Code)	
The City of Oklahoma City		<input type="checkbox"/> PH		420 W. Main, Ste 920	
		<input type="checkbox"/> IH		Oklahoma City, OK 73102	
		<input type="checkbox"/> CPD			
		<input checked="" type="checkbox"/> Housing			

3a. Name of Contact Person			3b. Phone Number (Including Area Code)			4. Reporting Period			5. Program Code (Not applicable for CPD programs.) See explanation of Codes at bottom of Page Use a separate sheet for each program code.			6. Date Submitted to Field Office		
Jerod Shadid			405-297-3608			<input checked="" type="checkbox"/> July 1 - June 30 (Annual -FY)								

Grant/Project Number or HUD Case Number or other identification of property, subdivision, dwelling unit, etc. 7a.	Amount of Contract or Subcontract 7b.	Type of Trade Code (See below) 7c.	Contractor or Subcontractor Business Racial/Ethnic (See below) 7d.	Woman Owned Business (Yes or No) 7e.	Prime Contractor Identification (ID) Number 7f.	Sec. 3 7g.	Subcontractor Identification (ID) Number 7h.	Sec. 3 7i.	Contractor/Subcontractor Name and Address 7j.				
									Name	Street	City	State	Zip
HOPWA-OKH21-F001	\$973,770	3	1	No	11-3718005	N			Homeless Alliance, Inc.	1724 NW 4th	Oklahoma City	OK	73106
		3	1	No		N	48-1248269	N	Expressions Community Center	2245 NW 39th St	Oklahoma City	OK	73112
		3	1	No		N	73-1287030	N	AIDS Support Program	PO Box 12187	Oklahoma City	OK	73157
		3	1	Yes		N	81-3299995	N	Diversity Center	2242 NW 39th	Oklahoma City	OK	73112
		3	2	No		N	81-3752891	N	Housing Location Services	2212 NW 50th Suite 158C	Oklahoma City	OK	73112

- |   |   |   |
|---|---|---|
| <p><b>7c: Type of Trade Codes:</b></p> <p><b>CPD:</b><br/>                 1 = New Construction<br/>                 2 = Education/Training<br/>                 3 = Other</p> <p><b>Housing/Public Housing:</b><br/>                 1 = New Construction<br/>                 2 = Substantial Rehab.<br/>                 3 = Repair<br/>                 4 = Service<br/>                 5 = Project Mangt.</p> | <p><b>7d: Racial/Ethnic Codes:</b></p> <p>1 = White Americans<br/>                 2 = Black Americans<br/>                 3 = Native Americans<br/>                 4 = Hispanic Americans<br/>                 5 = Asian/Pacific Americans<br/>                 6 = Hasidic Jews</p> | <p><b>5: Program Codes (Complete for Housing and Public and Indian Housing programs only):</b></p> <p>1 = All Insured, including Section 8<br/>                 2 = Flexible Subsidy<br/>                 3 = Section 8 Noninsured, Non-HFDA<br/>                 4 = Insured (Management)</p> <p>5 = Section 202<br/>                 6 = HUD-Held (Management)<br/>                 7 = Public/India Housing<br/>                 8 = Section 811</p> |
|---|---|---|

**Contract and Subcontract Activity-Housing Opportunities for Persons With AIDS-CV**

U.S. Department of Housing and Urban Development

OMB Approval No.: 2577-0088

OMB Approval No.: 2502-0355

Public reporting burden for this collection of information is estimated to average .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. The Information is voluntary. HUD may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB Control Number.

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1. Grantee/Project Owner/Developer/Sponsor/Builder/Agency	Check if:	2. Location (City, State Zip Code)
The City of Oklahoma City	<input type="checkbox"/> PH	420 W. Main, Ste 920
	<input type="checkbox"/> IH	Oklahoma City, OK 73102
	<input type="checkbox"/> CPD	
	<input checked="" type="checkbox"/> Housing	

3a. Name of Contact Person	3b. Phone Number (Including Area Code)	4. Reporting Period	5. Program Code (Not applicable for CPD programs.) See explanation of Codes at bottom of Page Use a separate sheet for each program code.	<input type="text"/>	6. Date Submitted to Field Office
Jerod Shadid	405-297-3608	<input checked="" type="checkbox"/> July 1 - June 30 (Annual -FY)			

Grant/Project Number or HUD Case Number or other identification of property, subdivision, dwelling unit, etc. 7a.	Amount of Contract or Subcontract 7b.	Type of Trade Code (See below) 7c.	Contractor or Subcontractor Business Racial/Ethnic (See below) 7d.	Woman Owned Business (Yes or No) 7e.	Prime Contractor Identification (ID) Number 7f.	Sec. 3 7g.	Subcontractor Identification (ID) Number 7h.	Sec. 3 7i.	Contractor/Subcontractor Name and Address 7j.				
									Name	Street	City	State	Zip
HOPWA-OKH20-FHW001	\$130,112	3	1	No	11-3718005	N			Homeless Alliance, Inc.	1724 NW 4th	Oklahoma City	OK	73106

- |  |  |  |
|--|--|--|
| <p><b>CPD:</b></p> <ul style="list-style-type: none"> <li>1 = New Construction</li> <li>2 = Education/Training</li> <li>3 = Other</li> </ul>   | <p><b>7c: Type of Trade Codes:</b></p> <p><b>Housing/Public Housing:</b></p> <ul style="list-style-type: none"> <li>1 = New Construction</li> <li>2 = Substantial Rehab.</li> <li>3 = Repair</li> <li>4 = Service</li> <li>5 = Project Mangt.</li> <li>6 = Professional</li> <li>7 = Tenant Services</li> <li>8 = Education/Training</li> <li>9 = Arch./Engrg. Appraisal</li> <li>0 = Other</li> </ul> | <p><b>7d: Racial/Ethnic Codes:</b></p> <ul style="list-style-type: none"> <li>1 = White Americans</li> <li>2 = Black Americans</li> <li>3 = Native Americans</li> <li>4 = Hispanic Americans</li> <li>5 = Asian/Pacific Americans</li> <li>6 = Hasidic Jews</li> </ul> |
| <p><b>5: Program Codes (Complete for Housing and Public and Indian Housing programs only):</b></p> <ul style="list-style-type: none"> <li>1 = All Insured, including Section 8</li> <li>2 = Flexible Subsidy</li> <li>3 = Section 8 Noninsured, Non-HFDA</li> <li>4 = Insured (Management)</li> <li>5 = Section 202</li> <li>6 = HUD-Held (Management)</li> <li>7 = Public/India Housing</li> <li>8 = Section 811</li> </ul> |  |  |

**Contract and Subcontract Activity-Emergency Solutions Grant**

U.S. Department of Housing and Urban Development

OMB Approval No.: 2577-0088  
OMB Approval No.: 2502-0355

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1. Grantee/Project Owner/Developer/Sponsor/Builder/Agency		Check if:	2. Location (City, State Zip Code)	
The City of Oklahoma City		PH	420 W. Main, Ste 920	
		IH	Oklahoma City, OK 73102	
		CPD	X	
		Housing		

3a. Name of Contact Person			3b. Phone Number (Including Area Code)		4. Reporting Period			5. Program Code (Not applicable for CPD programs. See explanation of Codes at bottom of Page Use a separate sheet for each program code.)		6. Date Submitted to Field Office	
Jerod Shadid			405-297-3608		<input checked="" type="checkbox"/> July 1 - June 30 (Annual -FY)						

Grant/Project Number or HUD Case Number or other identification of property, subdivision, dwelling unit, etc. 7a.	Amount of Contract or Subcontact 7b.	Type of Trade Code (See below) 7c.	Contractor or Subcontractor Business Racial/Ethnic (See below) 7d.	Woman Owned Business (Yes or No) 7e.	Prime Contractor Identification (ID) Number 7f.	Sec. 3 7g.	Subcontractor Identification (ID) Number 7h.	Sec. 3 7i.	Contractor/Subcontractor Name and Address 7j.				
									Name	Street	City	State	Zip
E-20-MC-40-0003	\$25,000	3	2	Yes	73-0930123	No			Community Health Centers, Inc.	12716 NE 36th Street	Spencer	OK	73084
E-20-MC-40-0003	\$85,000	3	1	Yes	11-3718005	No			Homeless Aliiance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
E-20-MC-40-0003	\$48,000	3	1	No	11-3718005	No			Homeless Aliiance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
E-20-MC-40-0003	\$17,000	3	1	No	11-3718005	No			Homeless Aliiance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
E-20-MC-40-0003	\$27,000	3	1	Yes	73-0579272	No			YWCA of Oklahoma City	2460 NW I-44 Service Rd	Oklahoma City	OK	73112
E-20-MC-40-0003	\$85,000	3	1	No	11-3718005	No			Homeless Aliiance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
E-20-MC-40-0003	\$31,936	3	1	Yes	73-0590277	No			Upward Transistions	1134 W Main St	Oklahoma City	OK	73106
E-20-MC-40-0003	\$40,000	3	1	No	73-1497381	No			City Care	2000 N Classen	Oklahoma City	OK	73106
E-20-MC-40-0003	\$5,250	3	1	No		No			Salvation Army	1001 N Penn	Oklahoma City	OK	73107
E-20-MC-40-0003	\$12,000	3	1	No	73-1022203	No			Legal Aid Services of Oklahoma	2915 Classen Blvd	Oklahoma City	OK	73106
E-20-MC-40-0003	\$14,654	3	1	No	73-1022203	No			Legal Aid Services of Oklahoma	2915 Classen Blvd	Oklahoma City	OK	73106
E-20-MC-40-0003	\$60,000	3	1	Yes	73-0657931	No			Mental Health Association Oklahoma	5330 E 31st Street	Tulsa	OK	74135
E-20-MC-40-0003	\$22,500	3	1	Yes	73-1293438	No			Positive Tomorrows	901 N. Villa	Oklahoma City	OK	73107
E-20-MC-40-0003	\$9,000	3	1	Yes	73-0940217	No			Pivot	201 NE 50th	City	OK	73105
E-20-MC-40-0003	\$10,000	3	1	Yes	46-5678806	No			Sisu Youth	3131 N. Pennsylvania	Oklahoma City	OK	73112

<b>7d: Racial/Ethnic Codes:</b>			<b>7e: Type of Trade Codes:</b>			<b>5: Program Codes (Complete for Housing and Public and Indian Housing programs only):</b>								
1 = White Americans 2 = Black Americans 3 = Native Americans 4 = Hispanic Americans 5 = Asian/Pacific Americans 6 = Hasidic Jews			1 = New Construction 2 = Substantial Rehab. 3 = Repair 4 = Service 5 = Project Mangt.			6 = Professional 7 = Tenant Services 8 = Education/Training 9 = Arch./Engrg. Appraisal 0 = Other			1 = All Insured, including Section8 2= Flexible Subsidy 3 = Section 8 Noninsured, Non-HFDA 4 = Insured (Management)			5 = Section 202 6 = HUD-Held 7 = Public/India Housing 8 = Section 811		



**Contract and Subcontract Activity-Emergency Solutions Grant-CV**

**U.S. Department of Housing and Urban Development**

OMB Approval No.: 2577-0088  
OMB Approval No.: 2502-0355

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1. Grantee/Project Owner/Developer/Sponsor/Builder/Agency		Check if:	2. Location (City, State Zip Code)
The City of Oklahoma City		PH	420 W. Main, Ste 920
		IH	Oklahoma City, OK 73102
		CPD	X
		Housing	

3a. Name of Contact Person	3b. Phone Number (Including Area Code)	4. Reporting Period	5. Program Code (Not applicable for CPD programs) See explanation of Codes at bottom of Page Use a separate sheet for each program code.	6. Date Submitted to Field Office
Jerod Shadid	405-297-3608	<input checked="" type="checkbox"/> July 1 - June 30 (Annual -FY)		

Grant/Project Number or HUD Case Number or other identification of property, subdivision, dwelling unit, etc. 7a.	Amount of Contract or Subcontact 7b.	Type of Trade Code (See below) 7c.	Contractor or Subcontractor Business Racial/Ethnic (See below) 7d.	Woman Owned Business (Yes or No) 7e.	Prime Contractor Identification (ID) Number 7f.	Sec. 3 7g.	Subcontractor Identification (ID) Number 7h.	Sec. 3 7i.	Contractor/Subcontractor Name and Address 7j.				
									Name	Street	City	State	Zip
E-20-MW-40-0003	\$887,210	3	1	Yes	73-0713883	No			City Rescue Mission	800 W California Ave	Oklahoma City	OK	73106
	\$656,745	3	1	No		No			City Care	2000 N Classen	Oklahoma City	OK	73106
E-20-MW-40-0004	\$171,955	3	1	No	73-0636561	No			Catholic Charities	1232 N. Classen Blvd	Oklahoma City	OK	73106
E-20-MW-40-0005	\$2,701,437	3	1	No	11-3718005	No			Homeless Aliiance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
E-20-MW-40-0006	\$125,000	3	1	No	73-1022203	No			Legal Aid Services of Oklahoma	2915 Classen Blvd	Oklahoma City	OK	73106
E-20-MW-40-0009	\$400,000	3	1	Yes	73-0590277	No			Upward Transistions	1134 W Main St	Oklahoma City	OK	73106
E-20-MW-40-0011	\$108,675	3	1	Yes	73-0785944	No			Neighborhood Services Organizations	431 SW 11th Street	Oklahoma City	OK	73109
E-20-MW-40-0013	\$787,639	3	1	Yes	73-0657931	No			Mental Health Association Oklahoma	5330 E 31st Street	Tulsa	OK	74135
E-20-MW-40-0014	\$386,600	3	1	Yes	46-5678806	No			Sisu Youth	3131 N. Pennsylvania	Oklahoma City	OK	73112
	\$100,000	3	1	No		No			Salvation Army	1001 N Penn	Oklahoma City	OK	73107
	\$140,000	3	1	Yes		No			Remerge	823 N Villa Ave	Oklahoma City	OK	73107
E-20-MW-40-0015	\$188,000	3	1	Yes	73-1293438	No			Positive Tomorrows	901 N. Villa	Oklahoma City	OK	73107
	\$80,562	3	1	Yes		No			YWCA	39th	Oklahoma City	OK	73112
E-20-MW-40-0014	\$262,200	3	1	Yes	73-0940217	No			Pivot	201 NE 50th	Oklahoma City	OK	73105

7c: Type of Trade Codes:		7d: Racial/Ethnic Codes:		5: Program Codes (Complete for Housing and Public and Indian Housing programs only):	
Housing/Public Housing:					
CPD:					
1 = New Construction	1 = New Construction	6 = Professional	1 = White Americans	1 = All Insured, including Section 8	5 = Section 202
			2 = Black Americans	2 = Flexible Subsidy	6 = HUD-Held
2 = Education/Training	2 = Substantial Rehab.	7 = Tenant Services	3 = Native Americans	3 = Section 8 Noninsured, Non-HFDA	7 = Public/India Housing
		8 =	4 = Hispanic Americans	4 = Insured (Management)	8 = Section 811
3 = Other	3 = Repair	Education/Training	5 = Asian/Pacific Americans		
	4 = Service	9 = Arch./Engrg. Appraisal	6 = Hasidic Jews		
	5 = Project Mangt.	0 = Other			

Previous editions are obsolete.

form HUD-2516 (8/98)

**Contract and Subcontract Activity- Continuum of Care**

**U.S. Department of Housing and Urban Development**

OMB Approval No.: 2577-0088

OMB Approval No.: 2502-0355

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The City of Oklahoma City	PH <input type="checkbox"/>	420 W. Main, Ste 920
	IH <input type="checkbox"/>	Oklahoma City, OK 73102
	CPD <input type="checkbox"/>	
	Housing <input type="checkbox"/>	

3a. Name of Contact Person	3b. Phone Number (Including Area Code)	4. Reporting Period	5. Program Code (Not applicable for CPD programs.) See explanation of Codes at bottom of Page Use a separate sheet for each program code.	6. Date Submitted to Field Office
Jerod Shadid	405-297-3608	<input checked="" type="checkbox"/> July 1 - June. 30 (Annual -FY)		

Grant/Project Number or HUD Case Number or other identification of property, subdivision, dwelling unit, etc. 7a.	Amount of Contract or Subcontract 7b.	Type of Trade Code (See below) 7c.	Contractor or Subcontractor Business Racial/Ethnic (See below) 7d.	Woman Owned Business (Yes or No) 7e.	Prime Contractor Identification (ID) Number 7f.	Sec. 3 7g.	Subcontractor Identification (ID) Number 7h.	Sec. 3 7i.	Contractor/Subcontractor Name and Address 7j.				
									Name	Street	City	State	Zip
OK128L6I02122004	\$336,136	3	1	No	73-1497381	No			City Care, Inc	2400 General Pershing Blvd	Oklahoma City	OK	73107
OK0062L6I022011	\$214,156	3	1	No	73-1497381	No			City Care, Inc	2400 General Pershing Blvd	Oklahoma City	OK	73107
OK0052L6I022008	\$468,960	3	1	Yes	73-0657931	No			Mental Health Association Oklahoma	1870 Boulder Ave	Tulsa	OK	74119
OK0061L6I022011	\$95,167	3	1	No	73-1221559	No			Community Enhancement Corp	1700 NE 4th Street	Oklahoma City	OK	73117
OK0026L6I022012	\$110,000	3	1	No	11-3718005	No			Homeless Alliance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
OK0019L6I022011	\$494,489	3	1	No	11-3718005	No			Homeless Alliance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
OK0044L6I022011	\$345,761	3	1	Yes	73-1098634	No			HOPE Community Services	6100 S. Walker Ave	Oklahoma City	OK	73139
OK0020L6I022011	\$190,804	3	1	Yes	73-1098634	No			HOPE Community Services	6101 S. Walker Ave	Oklahoma City	OK	73139
OK0053L6I022010	\$358,635	3	1	Yes	73-1098634	No			HOPE Community Services	6102 S. Walker Ave	Oklahoma City	OK	73139
OK0024L6I022013	\$373,064	3	1	Yes	73-1098634	No			HOPE Community Services	6103 S. Walker Ave	Oklahoma City	OK	73139
OK0045L6I022012	\$80,834	3	1	Yes	73-6111618	No			Red Rock Behavioral Health	4400 N. Lincoln Blvd	Oklahoma City	OK	73105
OK0046L6I022012	\$150,767	3	1	Yes	73-6111618	No			Red Rock Behavioral Health	4401 N. Lincoln Blvd	Oklahoma City	OK	73105
OK0126L6I022004	\$372,435	3	1	No	11-3718005	No			Homeless Alliance, Inc	1724 NW 4th Street	Oklahoma City	OK	73106
OK0087L6I021906	\$21,400	3	1	No	73-0800311	No			HeartLine	3801 NW 63rd	Oklahoma City	OK	73157
OK0127L6I022004	\$205,749	3	1	No	73-0657931	No			Mental Health Association Oklahoma	1870 Boulder Ave	Tulsa	OK	74119

- |   |   |   |
|---|---|---|
| <p><b>7c: Type of Trade Codes:</b></p> <p><b>CPD:</b></p> <p>1 = New Construction</p> <p>2 = Education/Training</p> <p>3 = Other</p> <p>1 = New Construction</p> <p>2 = Substantial Rehab.</p> <p>3 = Repair</p> <p>4 = Service</p> <p>5 = Project Mangt.</p> <p>6 = Professional</p> <p>7 = Tenant Services</p> <p>8 = Education/Training</p> <p>9 = Arch./Engrg. Appraisal</p> <p>0 = Other</p> | <p><b>7d: Racial/Ethnic Codes:</b></p> <p>1 = White Americans</p> <p>2 = Black Americans</p> <p>3 = Native Americans</p> <p>4 = Hispanic Americans</p> <p>5 = Asian/Pacific Americans</p> <p>6 = Hasidic Jews</p> | <p><b>5: Program Codes (Complete for Housing and Public and Indian Housing programs only):</b></p> <p>1 = All Insured, including Section8</p> <p>2= Flexible Subsidy</p> <p>3 = Section 8 Noninsured, Non-HFDA</p> <p>4 = Insured (Management)</p> <p>5 = Section 202</p> <p>6 = HUD-Held (Management)</p> <p>7 = Public/India Housing</p> <p>8 = Section 811</p> |
|---|---|---|

**APPENDIX 10**  
**HOPWA CAPER**  
**HUD FORM 40110-D**



# **Housing Opportunities for Persons With AIDS (HOPWA) Program**

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

**OMB Number 2506-0133 (Expiration Date: 11/30/2023)**

The CAPER report for HOPWA formula grantees provides annual information on program accomplishments that supports program evaluation and the ability to measure program beneficiary outcomes as related to: maintain housing stability; prevent homelessness; and improve access to care and support. 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. Reporting is required for all HOPWA formula grantees. The public reporting burden for the collection of information is estimated to average 41 hours per manual response, or less if an automated data collection and retrieval system is in use, along with 60 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. HUD's requirements for reports submitted by HOPWA formula grantees are supported by 42 U.S.C. § 12911 and HUD's regulations at 24 CFR § 574.520(a). 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. While confidentiality is not assured, HUD generally only releases this information as required or permitted by law.

**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 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 demonstrating coordination with other Consolidated Plan resources. HUD uses the CAPER 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.

**Table of Contents**

**PART 1: Grantee Executive Summary**

1. Grantee Information
2. Project Sponsor Information
5. Grantee Narrative and Performance Assessment
  - a. Grantee and Community Overview
  - b. Annual Performance under the Action Plan
  - c. Barriers or Trends Overview

**PART 2: Sources of Leveraging and Program Income**

1. Sources of Leveraging
2. Program Income and Resident Rent Payments

**PART 3: Accomplishment Data: Planned Goals and Actual Outputs**

**PART 4: Summary of Performance Outcomes**

1. Housing Stability: Permanent Housing and Related Facilities
2. Prevention of Homelessness: Short-Term Housing Payments
3. Access to Care and Support: Housing Subsidy Assistance with Supportive Services

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

**PART 6: Annual Report of Continued Use for HOPWA Facility-Based Stewardship Units (Only)**

**PART 7: Summary Overview of Grant Activities**

- A. Information on Individuals, Beneficiaries and Households Receiving HOPWA Housing Subsidy Assistance (TBRA, STRMU, PHP, Facility Based Units, Master Leased Units ONLY)
- B. Facility-Based Housing Assistance

**Continued Use Periods.** Grantees that used HOPWA funding for new construction, acquisition, or substantial rehabilitation of a building or structure are required to operate the building or structure for HOPWA-eligible beneficiaries for a ten (10) years period. If no further HOPWA funds are used to support the facility, in place of completing Section 7B of the CAPER, the grantee must submit an Annual Report of Continued Project Operation throughout the required use periods. This report is included in Part 6 in CAPER. The required use period is three (3) years if the rehabilitation is non-substantial.

**Record Keeping.** Names and other individual information must be kept confidential, as required by 24 CFR 574.440. However, HUD reserves the right to review the information used to complete this report for grants management oversight purposes, except for recording any names and other identifying information. **In the case that HUD must review client-level data, no client names or identifying information will be retained or recorded. Information is reported in aggregate to HUD without personal identification. Do not submit client or personal information in data systems to HUD.**

In connection with the development of the Department’s standards for Homeless Management Information Systems (HMIS), universal data elements are being collected for clients of HOPWA-funded homeless assistance projects. These project sponsor records would include: Name, Social Security Number, Date of Birth, Ethnicity and Race, Gender, Veteran Status, Disabling Conditions, Residence Prior to Program Entry, Zip Code of Last Permanent Address, Housing Status, Program Entry

Date, Program Exit Date, Personal Identification Number, and Household Identification Number. These are intended to match the elements under HMIS. The HOPWA program-level data elements include: Income and Sources, Non-Cash Benefits, HIV/AIDS Status, Services Provided, Housing Status or Destination at the end of the operating year, Physical Disability, Developmental Disability, Chronic Health Condition, Mental Health, Substance Abuse, Domestic Violence, Medical Assistance, and T-cell Count. Other HOPWA projects sponsors may also benefit from collecting these data elements. HMIS local data systems must maintain client confidentiality by using a closed system in which medical information and HIV status are only shared with providers that have a direct involvement in the client’s case management, treatment and care, in line with the signed release of information from the client.

**Operating Year.** HOPWA formula grants are annually awarded for a three-year period of performance with three operating years. The information contained in this CAPER must represent a one-year period of HOPWA program operation that coincides with the grantee’s program year; this is the operating year. More than one HOPWA formula grant awarded to the same grantee may be used during an operating year and the CAPER must capture all formula grant funding used during the operating year. Project sponsor accomplishment information must also coincide with the operating year this CAPER covers. Any change to the period of performance requires the approval of HUD by amendment, such as an extension for an additional operating year.

**Final Assembly of Report.** After the entire report is assembled, 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: at [HOPWA@hud.gov](mailto:HOPWA@hud.gov). Electronic submission to HOPWA Program office is preferred; however, if electronic submission is not possible, hard copies can be mailed to: Office of HIV/AIDS Housing, Room 7248, U.S. Department of Housing and Urban Development, 451 Seventh Street, SW, Washington, D.C., 20410.

**Definitions**

**Adjustment for Duplication:** Enables the calculation of unduplicated output totals by accounting for the total number of households or units that received more than one type of HOPWA assistance in a given service category such as HOPWA Subsidy Assistance or Supportive Services. For example, if a client household received both TBRA and STRMU during the operating year, report that household in the category of HOPWA Housing Subsidy Assistance in Part 3, Chart 1, Column [1b] in the following manner:

HOPWA Housing Subsidy Assistance		[1] Outputs: Number of Households
1.	<b>Tenant-Based Rental Assistance</b>	1
2a.	<b>Permanent Housing Facilities:</b> Received Operating Subsidies/Leased units	
2b.	<b>Transitional/Short-term Facilities:</b> Received Operating Subsidies	
3a.	<b>Permanent Housing Facilities:</b> Capital Development Projects placed in service during the operating year	
3b.	<b>Transitional/Short-term Facilities:</b> Capital Development Projects placed in service during the operating year	
4.	<b>Short-term Rent, Mortgage, and Utility Assistance</b>	1
5.	<b>Adjustment for duplication (subtract)</b>	1
6.	<b>TOTAL Housing Subsidy Assistance (Sum of Rows 1-4 minus Row 5)</b>	1

**Administrative Costs:** Costs for general management, oversight, coordination, evaluation, and reporting. By statute, grantee administrative costs are limited to 3% of total grant award, to be expended over the life of the grant. Project sponsor administrative costs are limited to 7% of the portion of the grant amount they receive.

**Beneficiary(ies):** All members of a household who received HOPWA assistance during the operating year including the one individual who qualified the household for HOPWA assistance as well as any other members of the household (with or without HIV) who benefitted from the assistance.

**Chronically Homeless Person:** An individual or family who : (i) is homeless and lives or resides individual or family who: (i) Is homeless and lives or resides in a place not meant for human habitation, a safe haven, or in an emergency shelter; (ii) has been homeless and living or residing in a place not meant for human habitation, a safe haven, or in an emergency shelter continuously for at least 1 year or on at least 4 separate occasions in the last 3 years; and (iii) has an adult head of household (or a minor head of household if no adult is present in the household) with a diagnosable substance use disorder, serious mental illness, developmental disability (as defined in section 102 of the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (42 U.S.C. 15002)), post traumatic stress disorder, cognitive impairments resulting from a brain injury, or chronic physical illness or disability, including the co-occurrence of 2 or more of those conditions. Additionally, the statutory definition includes as chronically homeless a person who currently lives or resides in an institutional care facility, including a jail, substance abuse or mental health treatment facility, hospital or other similar facility, and has resided there for fewer than 90 days if such person met the other criteria for homeless prior to entering that facility. (See 42 U.S.C. 11360(2)) This does not include doubled-up or overcrowding situations.

**Disabling Condition:** Evidencing a diagnosable substance use disorder, serious mental illness, developmental disability, chronic physical illness, or disability, including the co-occurrence of two or more of these conditions. In addition, a disabling condition may limit an individual's ability to work or perform one or more activities of daily living. An HIV/AIDS diagnosis is considered a disabling condition.

**Facility-Based Housing Assistance:** All eligible HOPWA Housing expenditures for or associated with supporting facilities including community residences, SRO dwellings, short-term facilities, project-based rental units, master leased units, and other housing facilities approved by HUD.

**Faith-Based Organization:** Religious organizations of three types: (1) congregations; (2) national networks, which include national denominations, their social service arms (for example, Catholic Charities, Lutheran Social Services), and networks of related organizations (such as YMCA and YWCA); and (3) freestanding religious organizations, which are incorporated separately from congregations and national networks.

**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 organizations are not considered "grassroots."

**HOPWA Eligible Individual:** The one (1) low-income person with HIV/AIDS who qualifies a household for HOPWA assistance. This person may be considered "Head of Household." When the CAPER asks for information on eligible individuals, report on this individual person only. Where there is more than one person with HIV/AIDS in the household, the additional PWH/A(s), would be considered a beneficiary(s).

**HOPWA Housing Information Services:** Services dedicated to helping persons living with HIV/AIDS and their families to identify, locate, and acquire housing. This may also include fair housing counseling for eligible persons who may encounter discrimination based on race, color, religion, sex, age, national origin, familial status, or handicap/disability.

**HOPWA Housing Subsidy Assistance Total:** The unduplicated number of households receiving housing subsidies (TBRA, STRMU, Permanent

Housing Placement services and Master Leasing) and/or residing in units of facilities dedicated to persons living with HIV/AIDS and their families and supported with HOPWA funds during the operating year.

**Household:** A single individual or a family composed of two or more persons for which household incomes are used to determine eligibility and for calculation of the resident rent payment. The term is used for collecting data on changes in income, changes in access to services, receipt of housing information services, and outcomes on achieving housing stability. Live-In Aides (see definition for Live-In Aide) and non-beneficiaries (e.g. a shared housing arrangement with a roommate) who resided in the unit are not reported on in the CAPER.

**Housing Stability:** The degree to which the HOPWA project assisted beneficiaries to remain in stable housing during the operating year. See *Part 5: Determining Housing Stability Outcomes* for definitions of stable and unstable housing situations.

**In-kind Leveraged Resources:** These are 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 criteria described in 2 CFR 200. 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 are used directly in or in support of HOPWA program delivery.

**Live-In Aide:** A person who resides with the HOPWA Eligible Individual and who meets the following criteria: (1) is essential to the care and well-being of the person; (2) is not obligated for the support of the person; and (3) would not be living in the unit except to provide the necessary supportive services. See *24 CFR 5.403 and the HOPWA Grantee Oversight Resource Guide for additional reference.*

**Master Leasing:** Applies to a nonprofit or public agency that leases units of housing (scattered-sites or entire buildings) from a landlord, and subleases the units to homeless or low-income tenants. By assuming the tenancy burden, the agency facilitates housing of clients who may not be able to maintain a lease on their own due to poor credit, evictions, or lack of sufficient income.

**Operating Costs:** Applies to facility-based housing only, for facilities that are currently open. Operating costs can include day-to-day housing function and operation costs like utilities, maintenance, equipment, insurance, security, furnishings, supplies and salary for staff costs directly related to the housing project but not staff costs for delivering services.

**Outcome:** The degree to which the HOPWA assisted household has been enabled to establish or 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.

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

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

**Program Income:** Gross income directly generated from the use of HOPWA funds, including repayments. See grant administration

requirements on program income at 24 CFR 200.307.

**Project-Based Rental Assistance (PBRA):** A rental subsidy program that is tied to specific facilities or units owned or controlled by a project sponsor. Assistance is tied directly to the properties and is not portable or transferable.

**Project Sponsor Organizations: Per HOPWA regulations at 24 CFR 574.3,** any nonprofit organization or governmental housing agency that receives funds under a contract with the grantee to provide eligible housing and other support services or administrative services as defined in 24 CFR 574.300. Project Sponsor organizations are required to provide performance data on households served and funds expended.

**SAM:** All organizations applying for a Federal award must have a valid registration active at [sam.gov](http://sam.gov). SAM (System for Award Management) registration includes maintaining current information and providing a valid DUNS number.

**Short-Term Rent, Mortgage, and Utility (STRMU) Assistance:** A time-limited, housing subsidy assistance designed to prevent homelessness and increase housing stability. Grantees may provide assistance for up to 21 weeks in any 52-week period. The amount of assistance varies per client depending on funds available, tenant need and program guidelines.

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

**Tenant-Based Rental Assistance (TBRA):** TBRA is a rental subsidy program similar to the Housing Choice Voucher program that grantees can provide to help low-income households access affordable housing. The TBRA voucher is not tied to a specific unit, so tenants may move to a different unit without losing their assistance, subject to individual program rules. The subsidy amount is determined in part based on household income and rental costs associated with the tenant's lease.

**Transgender:** Transgender is defined as a person who identifies with, or presents as, a gender that is different from the person's gender assigned at birth.

**Veteran:** A veteran is someone who has served on active duty in the Armed Forces of the United States. This does not include inactive military reserves or the National Guard unless the person was called up to active duty.

# Housing Opportunities for Person With AIDS (HOPWA) Consolidated Annual Performance and Evaluation Report (CAPER) Measuring Performance Outputs and Outcomes

OMB Number 2506-0133 (Expiration Date: 11/30/2023)

## Part 1: Grantee Executive Summary

As applicable, complete the charts below to provide more detailed information about the agencies and organizations responsible for the administration and implementation of the HOPWA program. 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 24 CFR 574.3.

*Note: If any information does not apply to your organization, please enter N/A. Do not leave any section blank.*

### 1. Grantee Information

<b>HUD Grant Number</b> OKH20-F001, OKH20-FHW001		<b>Operating Year for this report</b> <i>From (mm/dd/yy)</i> 07/01/21 <i>To (mm/dd/yy)</i> 06/30/22		
<b>Grantee Name</b> City of Oklahoma City				
<b>Business Address</b>		420 W Main Street Suite 920		
<b>City, County, State, Zip</b>		Oklahoma City	Oklahoma	OK 73102
<b>Employer Identification Number (EIN) or Tax Identification Number (TIN)</b>		73-6005359		
<b>DUN &amp; Bradstreet Number (DUNs):</b>		014104777	<b>System for Award Management (SAM)::</b> <b>Is the grantee's SAM status currently active?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>If yes, provide SAM Number:</b>	
<b>Congressional District of Grantee's Business Address</b>		5		
<b>*Congressional District of Primary Service Area(s)</b>		3    4    5		
<b>*City(ies) and County(ies) of Primary Service Area(s)</b>		Cities: Oklahoma City, El Reno, Norman, Chickasha, Guthrie, Chandler, Purcell	Counties: Oklahoma, Canadian, Cleveland, Grady, Logan, Lincoln, McClain	
<b>Organization's Website Address</b>  www.okc.gov		<b>Is there a waiting list(s) for HOPWA Housing Subsidy Assistance Services in the Grantee Service Area?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>If yes, explain in the narrative section what services maintain a waiting list and how this list is administered.</b>		

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



## 2. Project Sponsor Information

Please complete Chart 2 for each organization designated or selected to serve as a project sponsor, as defined by 24 CFR 574.3. Use this section to report on organizations involved in the direct delivery of services for client households.

*Note: If any information does not apply to your organization, please enter N/A.*

<b>Project Sponsor Agency Name</b> The Homeless Alliance Inc		<b>Parent Company Name, if applicable</b>	
<b>Name and Title of Contact at Project Sponsor Agency</b>	Dan Straughan, Executive Director		
<b>Email Address</b>	danstraughan@homelessalliance.org		
<b>Business Address</b>	1724 NW 4 <sup>th</sup> Street		
<b>City, County, State, Zip,</b>	Oklahoma City, Oklahoma 73106		
<b>Phone Number (with area code)</b>	405-415-8410		
<b>Employer Identification Number (EIN) or Tax Identification Number (TIN)</b>	11-3718005	<b>Fax Number (with area code)</b> 405-415-8410	
<b>DUN &amp; Bradstreet Number (DUNs):</b>	189040509		
<b>Congressional District of Project Sponsor's Business Address</b>	5		
<b>Congressional District(s) of Primary Service Area(s)</b>	3, 4, & 5		
<b>City(ies) and County(ies) of Primary Service Area(s)</b>	<b>Cities:</b> Oklahoma City, El Reno, Norman, Chickasha, Chandler, Purcell	<b>Counties:</b> Oklahoma, Cleveland, Logan, Grady, Canadian, Lincoln, McClain	
<b>Total HOPWA contract amount for this Organization for the operating year</b>	973,770		
<b>Organization's Website Address</b>	Homelessalliance.org		
<b>Is the sponsor a nonprofit organization?</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  <i>Please check if yes and a faith-based organization.</i> <input type="checkbox"/> <i>Please check if yes and a grassroots organization.</i> <input type="checkbox"/>		<b>Does your organization maintain a waiting list?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  <b>If yes, explain in the narrative section how this list is administered.</b>	

## 5. Grantee Narrative and Performance Assessment

### 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.*

The Project Sponsor continues to make improvements to the program this year that we are very proud of. These include, but are not limited to, serving more unique households, partnering with new and existing agencies, building a positive relationship with OU School of Social Work and training interns, enhancing the one-stop-shop model through increased services available on-site, and adding on three additional case managers.

Grantee, City of Oklahoma City:

The City of Oklahoma City is the recipient of Housing Opportunities for Persons with AIDS (HOPWA) funds. Funds are awarded annually as a formula grant allocation directly from the department of Housing and Urban Development (HUD). The City of Oklahoma City administers the grant and signed a contract with the Homeless Alliance as the project sponsor to provide services with the funds. Each client is assessed for their needs in maintaining stable housing arrangements, reducing their risk of homelessness and improving their access to HIV care. Case managers provide HOPWA housing subsidy assistance through Tenant-Based Rental Assistance (TBRA), Permanent Housing Placement (PHP), Short-Term Rental, Mortgage, and Utility assistance (STRMU), Emergency housing (facility-based housing assistance), Housing Information Referral and Inspection Services, and Supportive Services. The Homeless Alliance Inc. provides the program oversight and financial duties. The Homeless Alliance shares 7% administration fee with AIDS Support Program sub-recipient. The contact for the City of Oklahoma City is Mr. Jerod Shadid, City of Oklahoma City Planning Department, Community Development Division: 405-297-3608 [jerod.shadid@gov.okc](mailto:jerod.shadid@gov.okc).

The OKC HOPWA service area includes 7 (seven) counties: Oklahoma, Cleveland, Canadian, Grady, Lincoln, Logan and McClain. The Oklahoma City.

Project Sponsor, Homeless Alliance:

The Homeless Alliance plays a unique role in central Oklahoma's work to end homelessness, including the following activities:

- Community Capacity Building
- Facilitating collaboration among all faith-based, government, and nonprofit agencies working with the homeless.
- Educating the broader community about homelessness.
- Coordinating community response to emerging homeless issues.
- Conducting research including the annual Point in Time Count of the homeless, needs assessments, surveys, and focus groups with stakeholders and the homeless.

The HOPWA Case Manager assists the client with understanding available housing resources and develops with each client a comprehensive housing plan along with appropriate referrals to partnering agencies. The plan identifies the household's ongoing housing stability needs and likely options for providing related assistance along with goals to assure clients are seeking proper medical care. This may include the use of other housing programs and mainstream health and support programs. The plan includes a budget, referrals for service/medical case management, legal, employment, food, and housing subsidy assistance needed for emergency and temporary rent, mortgage and utility payments to transition eligible persons into more permanent housing arrangements.

- Emergency Housing: provides temporary shelter at local long-stay hotels, some with full kitchens, for a maximum of 60 days.
- Permanent Housing Placement: Expenditures that help establish a household in a housing unit including application fees, related credit checks, and reasonable security deposits necessary to move persons into permanent housing.
- Housing Information Referral and Inspection Services: This service provides information regarding available and affordable housing that meets the needs of people living with HIV/AIDS. Identifying vacancies, application procedures, and other services that can prevent homelessness and return unsheltered persons to suitable housing. Staff proactively develops relationships with landlords and property management companies willing to rent permanent housing for hard to place clients. Many clients benefit from relocating to a lower rent and/or all bills paid housing. Housing inspections ensure all units meet HUD's habitability standards. This provider can advocate for the tenant with the landlord once placed as needed.
- Short-Term Rent/Mortgage & Utility (STRMU): Payments to enable eligible individuals to remain in their own dwelling. HOPWA funds are provided to prevent homelessness. Each request for assistance is reviewed monthly to determine eligibility based on financial and HIV-related need. Maximum of 21 weeks within a 52-week period capping at \$3,000. Due to COVID 19, clients affected have been extended per HUD guidelines.
- Tenant Based Rental Assistance (TBRA): Assists income-eligible individuals or families with an HIV-related need with their rent until they secure a Section 8 voucher, or other affordable stable housing. Client cases are reviewed every three months to reviewed for progress towards meeting goals in securing stable and permanent housing.

Point of contact for the Homeless Alliance is Dan Straughan, Executive Director.

Sub-recipient, AIDS Support Program, Inc.:

The AIDS Support Program, Inc. owns and operates The Winds House, providing transitional units to the HOPWA HIV housing continuum in the 2021-2022 contract year. The housing units are leveraged to the HOPWA program, as is a full-time HOPWA housing case manager who is provided through this project. This case manager is housed onsite and is available to clients during working hours. The Winds House added an additional unit at 1725 NW 18th St totaling in 12 units.

Point of contact for the AIDS Support network is John Martinez, (314) 422-7683.

Sub-recipient, Urban Home Locator:

For the 2021-2022 HOPWA grant, Urban Home Locator housing location services conducted housing services for at least 55 households. These housing services included: speaking with the HOPWA clients about their housing needs; property searches in the Oklahoma City Metro area for the clients; meeting with the clients to show them desired properties and speaking with the property owners and property managers to advocate for the clients during the application approval process; advocating abatements in rental rates, deposits and application fees with owners and property managers to reduce the costs of leasing properties for the clients and the HOPWA Program; procuring or making properties All-Bills-Paid for clients who have unpaid bills to utility providers and cannot obtain services; post move in advocating for the clients on maintenance issues, resolving potential evictions and lease violations with owners and property managers; and meeting with the clients, property managers and property owners to conduct the Habitability Inspections on the leased properties to determine approvability and conducting lease signings. The Urban Home Locator works closely with the HOPWA case managers and provides inspection reports, fair market rent, rent reasonableness, leases, W-9s' and all other related

documentation required for the program. The continued success in housing these clients, with housing barriers, is easier due to the developed relationships with several property managers and owners, over the years, as they will lease to the clients anytime, and make the units ready quickly.

**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 operating year among different categories of housing and geographic areas to address needs throughout the grant service area, consistent with approved plans.

HOPWA continued to increase its numbers every fiscal year until the pandemic in 2020. Due to mitigation practices and staff turnover, the number served was slightly lower than the previous year. HOPWA continues to partner with the University of Oklahoma School of Social Work, and their students, developing a program to assist clients with multiple barriers. HOPWA collaborated with the Diversity Center and Expressions Community Center (ECC) to encourage the public to get tested in our “one-stop-shop” facility, as the stigma of HIV/AIDS remains. Challenges we continue to face apart from stigma are assuring our EMSA areas of our services. The table below details the distribution of funds spent in the past fiscal year by the program:

Tenant-Based Rental Assistance	\$172,633
Emergency Housing	\$79,973
Short-Term Rent, Mortgage and Utility Assistance which also includes \$35,880 in HOPWA-CV	\$183,196
Permanent Housing Placement Services	\$48,809
Supportive Services	\$376,949

**2. Outcomes Assessed.** Assess your program’s success in enabling HOPWA beneficiaries to establish and/or better maintain a stable living environment in housing that is safe, decent, sanitary, and improve access to care. Compare current year results to baseline results for clients. Describe how program activities/projects contributed to meeting stated goals. If program did not achieve expected targets, please describe how your program plans to address challenges in program implementation and the steps currently being taken to achieve goals in next operating year. If your program exceeded program targets, please describe strategies the program utilized and how those contributed to program successes.

Last year, HOPWA relocated to the Diversity Center in the heart of the LGBTQ+ community. This new location offers additional office space for our continuously growing program and is directly across the street from our previous location at Expressions Community Center (ECC). Through collaboration with the Diversity Center, ECC and other local agencies, HOPWA continued to work with the community to reflect a “one-stop-shop” within the LGBTQ+ community. HOPWA successfully provided case management

services for housing while partnering with HIV coalition and CO-OP, which includes but is not limited to the following: OU (IDI), RAIN, DHS, Red Rock, Diversity Center, Latino Community Development Agency, The Recovery Center, Guiding Right, and Legal Aid. In addition, Homeless Alliance staff lead and facilitated coordinated case management efforts in the CoC, of which HOPWA is an active participant. HOPWA will continue to accomplish affirmative outreach by partnering with any agency to navigate services for clients, “regardless of their race, color, religion, sex, age, national origin, familial status, or handicap.”

To ensure the success of HOPWA, trainings are often offered to all staff along with weekly supervision. In addition, The Director of Support Services, Team Lead, and HOPWA case managers staff cases weekly and are continuously monitored throughout the year.

Due to COVID-19 challenges, change of leadership, and relocation, HOPWA was unable to achieve expected targets in some areas. For the coming fiscal year, HOPWA plans to add an additional case manager and a compliance specialist specifically for the HOPWA program. These steps have been taken to ensure that the goals for the next operating year will be met and to provide quicker and more efficient case management services for clients.

Barriers for HOPWA housing continues to be the lack of affordable housing within EMSA areas. Although affordable housing is not always accessible, through efforts and collaboration with our Urban Home Locator, we are able to find units that pass housing inspections that assure clients are in a safe and sanitary unit. The chart below details our goals versus actual numbers for the number of heads of household for the past fiscal year:

Program	Goal	Actual
Tenant-Based Rental Assistance	70	45
Short-Term Rent, Mortgage and Utility Assistance	160	89
Emergency Housing	30	30
Permanent Housing Placement Services	50	55
HOPWA-CV Short-Term Rent Mortgage and Utility Assistance	50	49

**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.

The Homeless Alliance operates a campus for homeless services that co-locates professional staff from 25 government, faith-based, and nonprofit agencies in central Oklahoma. The Homeless Alliance is a main convener of our community’s coordinated entry efforts, and as such, HOPWA is an active participant in coordinated entry, coordinated case management, etc. The continuous utilization of HMIS has been able to collect data for the HOPWA program more efficiently.

The HOPWA program is in the heart of the LGBTQ+ community at The Diversity Center, directly across from Expressions Community Center. Within a 500-foot radius, there are offices for six different HIV service organizations and other LGBTQ+ organizations among partnering agencies. The HIV prevention and case groups at ECC and Diversity Center include groups that target the Latinx and African American communities. All organizations work together to provide full wraparound services for HIV testing,

prevention, and expedited care to HIV medical case management provided by the Department of Human Services (DHS). One of the major challenges faced by community-based organizations working in HIV/AIDS is a dwindling pool of available resources coupled with rising expectations; essentially organizations are expected to do more with less. Networking within the HIV/AIDS services and homeless community enables organizations to work more strategically and cost-effectively. To that end, HOPWA case managers attend the HIV coalition and CO-OP providers meetings, The Coalition to End Poverty, and other homeless service meetings.

The Homeless Alliance has effective collaborative relationships with the 25+ government, faith-based, and nonprofit agencies participating in the Journey Home-OKC initiatives as well as all ten of OKC’s overnight shelters, as well as the transitional and permanent supportive housing providers in Oklahoma City.

The Executive Director for the Homeless Alliance is the past president of the Governor’s Interagency Council on Homelessness (GICH) and the past president of the United Way Agency Directors Association. United Way’s service area of the seven central Oklahoma counties closely matches the EMSA areas required by the grant and our status as a partner agency enables us to better facilitate collaboration with many of the homeless servicing agencies in counties outside Oklahoma City.

**4. Technical Assistance.** Describe any program technical assistance needs and how they would benefit program beneficiaries. The Homeless Alliance integrated an updated fax system and switched email services to allow better coordination within the agency. The Homeless Alliance intends to assist HOPWA with allocating separate phone lines in the offices where HOPWA is located. This will assist with the goal of increasing capacity and availability.

**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 in the administration or implementation of the HOPWA program, how they affected your program’s ability to achieve the objectives and outcomes discussed, and, actions taken in response to barriers, and recommendations for program improvement. Provide an explanation for each barrier selected.

Since last year’s report, the Homeless Alliance restructured the HOPWA program and changed the program name to Healthy Housing. Due to the ongoing stigma of HIV, the decision was made to change the name to Healthy Housing to better protect client’s statuses and give them autonomy of disclosing their statuses. With the restructuring, there is now an Associate Director of Healthy Housing, two new team lead positions, a new case manager, and an intake specialist. With these additional staff members added in this last fiscal year, HOPWA has benefited by having more resources and staff within our agency to keep up

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

with the high need. For the next fiscal year, HOPWA intends on hiring an additional case manager and compliance specialist. This is projected to be done by December 2022. By adding a new case manager and

compliance specialist, processes will be streamlined more efficiently, effectively, and accurately with guidelines set by HUD.

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.

As COVID-19 continues to affect our EMSA area, HOPWA adjusted to meet the needs of clients and staff. We have provided educational material on ways to stay safe, information on testing and vaccination locations, as well as providing PPE supplies and Covid-19 tests, and food box delivery. We have adjusted to over-the-phone intakes and appointments as needed to reduce safety concerns.

3. Identify any evaluations, studies, or other assessments of the HOPWA program that are available to the public. While the Homeless Alliance completes consumer satisfaction surveys, the results of those are used for internal improvements, and are not made public. The sensitive nature of HOPWA participant data makes public releases of information difficult.

**End of PART 1**

## PART 2: Sources of Leveraging and Program Income

### 1. 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. In Column [1], identify the type of leveraging. Some common sources of leveraged funds have been provided as a reference point. You may add Rows as necessary to report all sources of leveraged funds. Include Resident Rent payments paid by clients directly to private landlords. Do NOT include rents paid directly to a HOPWA program as this will be reported in the next section. In Column [2] report the amount of leveraged funds expended during the operating year. Use Column [3] to provide some detail about the type of leveraged contribution (e.g., case management services or clothing donations). In Column [4], check the appropriate box to indicate whether the leveraged contribution was a housing subsidy assistance or another form of support.

*Note: Be sure to report on the number of households supported with these leveraged funds in Part 3, Chart 1, Column d.*

#### A. Source of Leveraging Chart

[1] Source of Leveraging	[2] Amount of Leveraged Funds	[3] Type of Contribution	[4] Housing Subsidy Assistance or Other Support
Public Funding			
Ryan White-Housing Assistance			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Ryan White-Other			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Housing Choice Voucher Program	\$544.20	Clients W/ Vouchers	<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Low Income Housing Tax Credit			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
HOME			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Continuum of Care			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Emergency Solutions Grant			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Public:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Public:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Public:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Public:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Public:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Private Funding			
Grants			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
In-kind Resources	\$8,400	Furniture, Hygiene, Move-In	<input type="checkbox"/> Housing Subsidy Assistance <input checked="" type="checkbox"/> Other Support
Other Private:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Private:			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Other Funding			
Grantee/Project Sponsor (Agency) Cash			<input type="checkbox"/> Housing Subsidy Assistance <input type="checkbox"/> Other Support
Resident Rent Payments by Client to Private Landlord	\$31,831		
<b>TOTAL (Sum of all Rows)</b>			



## 2. Program Income and Resident Rent Payments

In Section 2, Chart A, report the total amount of program income and resident rent payments directly generated from the use of HOPWA funds, including repayments. Include resident rent payments collected or paid directly to the HOPWA program. Do NOT include payments made directly from a client household to a private landlord.

*Note: Please see report directions section for definition of program income. (Additional information on program income is available in the HOPWA Grantee Oversight Resource Guide).*

### A. Total Amount Program Income and Resident Rent Payment Collected During the Operating Year

Program Income and Resident Rent Payments Collected		Total Amount of Program Income (for this operating year)
1.	Program income (e.g. repayments)	0
2.	Resident Rent Payments made directly to HOPWA Program	0
3.	<b>Total Program Income and Resident Rent Payments (Sum of Rows 1 and 2)</b>	0

### B. Program Income and Resident Rent Payments Expended To Assist HOPWA Households

In Chart B, report on the total program income and resident rent payments (as reported above in Chart A) expended during the operating year. Use Row 1 to report Program Income and Resident Rent Payments expended on Housing Subsidy Assistance Programs (i.e., TBRA, STRMU, PHP, Master Leased Units, and Facility-Based Housing). Use Row 2 to report on the Program Income and Resident Rent Payment expended on Supportive Services and other non-direct Housing Costs.

Program Income and Resident Rent Payment Expended on HOPWA programs		Total Amount of Program Income Expended (for this operating year)
1.	Program Income and Resident Rent Payment Expended on Housing Subsidy Assistance costs	0
2.	Program Income and Resident Rent Payment Expended on Supportive Services and other non-direct housing costs	0
3.	<b>Total Program Income Expended (Sum of Rows 1 and 2)</b>	0

**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.

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

<b>HOPWA Performance Planned Goal and Actual</b>		[1] Output: Households				[2] Output: Funding	
		HOPWA Assistance		Leveraged Households		HOPWA Funds	
		a.	b.	c.	d.	e.	f.
		Goal	Actual	Goal	Actual	HOPWA Budget	HOPWA Actual
<b>HOPWA Housing Subsidy Assistance</b>		<b>[1] Output: Households</b>				<b>[2] Output: Funding</b>	
1.	Tenant-Based Rental Assistance	70	45			\$224,668	\$172,633
2a.	<b>Permanent Housing Facilities:</b> Received Operating Subsidies/Leased units (Households Served)	N/A	N/A				0
2b.	<b>Transitional/Short-term Facilities:</b> Received Operating Subsidies/Leased units (Households Served) (Households Served)	N/A	N/A				0
3a.	<b>Permanent Housing Facilities:</b> Capital Development Projects placed in service during the operating year (Households Served)	N/A	N/A				0
3b.	<b>Transitional/Short-term Facilities:</b> Capital Development Projects placed in service during the operating year (Households Served)	N/A	N/A				0
4.	Short-Term Rent, Mortgage and Utility Assistance	160	89			\$147,500	\$147,316
5.	Permanent Housing Placement Services	50	55			\$87,639	\$48,809
6.	Adjustments for duplication (subtract)	N/A	52				
7.	<b>Total HOPWA Housing Subsidy Assistance</b> (Columns a – d equal the sum of Rows 1-5 minus Row 6; Columns e and f equal the sum of Rows 1-5)	280	137			\$459,807	\$368,758
<b>Housing Development (Construction and Stewardship of facility based housing)</b>		<b>[1] Output: Housing Units</b>				<b>[2] Output: Funding</b>	
8.	Facility-based units; Capital Development Projects not yet opened (Housing Units)						0
9.	Stewardship Units subject to 3- or 10- year use agreements						
10.	<b>Total Housing Developed</b> (Sum of Rows 8 & 9)						
<b>Supportive Services</b>		<b>[1] Output: Households</b>				<b>[2] Output: Funding</b>	
11a.	Supportive Services provided by project sponsors that also delivered HOPWA housing subsidy assistance	280	137			\$407,549	\$376,949
11b.	Supportive Services provided by project sponsors that only provided supportive services.	310	193				
12.	Adjustment for duplication (subtract)						
13.	<b>Total Supportive Services</b> (Columns a – d equals the sum of Rows 11 a & b minus Row 12; Columns e and f equal the sum of Rows 11a & 11b)	280	137			\$407,549	\$376,949
<b>Housing Information Services</b>		<b>[1] Output: Households</b>				<b>[2] Output: Funding</b>	
14.	Housing Information Services						
15.	<b>Total Housing Information Services</b>						

Grant Administration and Other Activities		[1] Output: Households				[2] Output: Funding	
16.	Resource Identification to establish, coordinate and develop housing assistance resources						
17.	Technical Assistance (if approved in grant agreement)						
18.	Grantee Administration (maximum 3% of total HOPWA grant)					\$68,164	\$29,739
19.	Project Sponsor Administration (maximum 7% of portion of HOPWA grant awarded)						0
20.	<b>Total Grant Administration and Other Activities (Sum of Rows 16 – 19)</b>					68,164	29,739
<b>Total Expended</b>						<b>[2] Outputs: HOPWA Funds Expended</b>	
						<b>Budget</b>	<b>Actual</b>
21.	<b>Total Expenditures for operating year (Sum of Rows 7, 10, 13, 15, and 20)</b>					934,520	775,446

## 2. Listing of Supportive Services

Report on the households served and use of HOPWA funds for all supportive services. Do NOT report on supportive services leveraged with non-HOPWA funds.

**Data check:** Total unduplicated households and expenditures reported in Row 17 equal totals reported in Part 3, Chart 1, Row 13.

Supportive Services		[1] Output:	[2] Output: Amount of HOPWA Funds Expended
1.	Adult day care and personal assistance	0	0
2.	Alcohol and drug abuse services	9	\$135
3.	Case management	330	\$364,220
4.	Child care and other child services	0	0
5.	Education	0	0
6.	Employment assistance and training	0	0
7.	Health/medical/intensive care services, if approved Note: Client records must conform with 24 CFR §574.310	0	0
8.	Legal services	0	0
9.	Life skills management (outside of case management)	0	0
10.	Meals/nutritional services	0	0
11.	Mental health services	0	0
12.	Outreach	0	0
13.	Transportation	72	\$3,215
14.	Other Activity (if approved in grant agreement). Specify: Housing Inspections	47	\$9,379
15.	<b>Sub-Total Households receiving Supportive Services (Sum of Rows 1-14)</b>	458	
16.	<b>Adjustment for Duplication (subtract)</b>	128	
17.	<b>TOTAL Unduplicated Households receiving Supportive Services (Column [1] equals Row 15 minus Row 16; Column [2] equals sum of Rows 1-14)</b>	330	\$376,949

### 3. Short-Term Rent, Mortgage and Utility Assistance (STRMU) Summary

In Row a, enter the total number of households served and the amount of HOPWA funds expended on Short-Term Rent, Mortgage and Utility (STRMU) Assistance. In Row b, enter the total number of STRMU-assisted households that received assistance with mortgage costs only (no utility costs) and the amount expended assisting these households. In Row c, enter the total number of STRMU-assisted households that received assistance with both mortgage and utility costs and the amount expended assisting these households. In Row d, enter the total number of STRMU-assisted households that received assistance with rental costs only (no utility costs) and the amount expended assisting these households. In Row e, enter the total number of STRMU-assisted households that received assistance with both rental and utility costs and the amount expended assisting these households. In Row f, enter the total number of STRMU-assisted households that received assistance with utility costs only (not including rent or mortgage costs) and the amount expended assisting these households. In row g, report the amount of STRMU funds expended to support direct program costs such as program operation staff.

**Data Check:** The total households reported as served with STRMU in Row a, column [1] and the total amount of HOPWA funds reported as expended in Row a, column [2] equals the household and expenditure total reported for STRMU in Part 3, Chart 1, Row 4, Columns b and f, respectively.

**Data Check:** The total number of households reported in Column [1], Rows b, c, d, e, and f equal the total number of STRMU households reported in Column [1], Row a. The total amount reported as expended in Column [2], Rows b, c, d, e, f, and g, equal the total amount of STRMU expenditures reported in Column [2], Row a.

Housing Subsidy Assistance Categories (STRMU)		[1] Output: Number of <u>Households</u> Served	[2] Output: Total HOPWA Funds Expended on STRMU during Operating Year
a.	<b>Total Short-term mortgage, rent and/or utility (STRMU) assistance</b>	89	\$147,316
b.	Of the total STRMU reported on Row a, total who received assistance with mortgage costs ONLY.	1	\$1472
c.	Of the total STRMU reported on Row a, total who received assistance with mortgage and utility costs.	0	0
d.	Of the total STRMU reported on Row a, total who received assistance with rental costs ONLY.	49	\$83,488.04
e.	Of the total STRMU reported on Row a, total who received assistance with rental and utility costs.	31	\$59,026.26
f.	Of the total STRMU reported on Row a, total who received assistance with utility costs ONLY.	8	3329.70
g.	Direct program delivery costs (e.g., program operations staff time)		0

**End of PART 3**

**Part 4: Summary of Performance Outcomes**

In Column [1], report the total number of eligible households that received HOPWA housing subsidy assistance, by type. In Column [2], enter the number of households that continued to access each type of housing subsidy assistance into next operating year. In Column [3], report the housing status of all households that exited the program.

**Data Check:** The sum of Columns [2] (Number of Households Continuing) and [3] (Exited Households) equals the total reported in Column[1].

**Note:** Refer to the housing stability codes that appear in Part 5: Worksheet - Determining Housing Stability Outcomes.

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

**A. Permanent Housing Subsidy Assistance**

	[1] Output: Total Number of Households Served	[2] Assessment: Number of Households that Continued Receiving HOPWA Housing Subsidy Assistance into the Next Operating Year	[3] Assessment: Number of Households that exited this HOPWA Program; their Housing Status after Exiting		[4] HOPWA Client Outcomes
Tenant-Based Rental Assistance	45	31	1 Emergency Shelter/Streets	3	Unstable Arrangements
			2 Temporary Housing	0	Temporarily Stable, with Reduced Risk of Homelessness
			3 Private Housing	6	Stable/Permanent Housing (PH)
			4 Other HOPWA	0	
			5 Other Subsidy	4	
			6 Institution	1	
			7 Jail/Prison	0	Unstable Arrangements
			8 Disconnected/Unknown	0	
			9 Death	0	
Permanent Supportive Housing Facilities/ Units	0	0	1 Emergency Shelter/Streets	0	Unstable Arrangements
			2 Temporary Housing	0	Temporarily Stable, with Reduced Risk of Homelessness
			3 Private Housing	0	Stable/Permanent Housing (PH)
			4 Other HOPWA	0	
			5 Other Subsidy	0	
			6 Institution	0	
			7 Jail/Prison	0	Unstable Arrangements
			8 Disconnected/Unknown	0	
			9 Death	0	

**B. Transitional Housing Assistance**

	[1] Output: Total Number of Households Served	[2] Assessment: Number of Households that Continued Receiving HOPWA Housing Subsidy Assistance into the Next Operating Year	[3] Assessment: Number of Households that exited this HOPWA Program; their Housing Status after Exiting		[4] HOPWA Client Outcomes
Transitional/ Short-Term Housing Facilities/ Units	30	1	1 Emergency Shelter/Streets	6	Unstable Arrangements
			2 Temporary Housing	3	Temporarily Stable with Reduced Risk of Homelessness
			3 Private Housing	1	Stable/Permanent Housing (PH)
			4 Other HOPWA	6	
			5 Other Subsidy	7	
			6 Institution	0	
			7 Jail/Prison	0	Unstable Arrangements
			8 Disconnected/unknown	2	

		9 Death	0	<i>Life Event</i>
B1: Total number of households receiving transitional/short-term housing assistance whose tenure exceeded 24 months		0		

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

Report the total number of households that received STRMU assistance in Column [1].

In Column [2], identify the outcomes of the households reported in Column [1] either at the time that they were known to have left the STRMU program or through the project sponsor’s best assessment for stability at the end of the operating year.

Information in Column [3] provides a description of housing outcomes; therefore, data is not required.

At the bottom of the chart:

- In Row 1a, report those households that received STRMU assistance during the operating year of this report, and the prior operating year.
- In Row 1b, report those households that received STRMU assistance during the operating year of this report, and the two prior operating years.

**Data Check:** The total households reported as served with STRMU in Column [1] equals the total reported in Part 3, Chart 1, Row 4, Column b.

**Data Check:** The sum of Column [2] should equal the number of households reported in Column [1].

**Assessment of Households that Received STRMU Assistance**

[1] Output: Total number of households	[2] Assessment of Housing Status		[3] HOPWA Client Outcomes
89	<b>Maintain Private Housing without subsidy</b> <i>(e.g. Assistance provided/completed and client is stable, not likely to seek additional support)</i>	1	<i>Stable/Permanent Housing (PH)</i>
	<b>Other Private Housing without subsidy</b> <i>(e.g. client switched housing units and is now stable, not likely to seek additional support)</i>	21	
	Other HOPWA Housing Subsidy Assistance	5	
	Other Housing Subsidy (PH)	1	
	<b>Institution</b> <i>(e.g. residential and long-term care)</i>	0	
	Likely that additional STRMU is needed to maintain current housing arrangements	59	<i>Temporarily Stable, with Reduced Risk of Homelessness</i>
	<b>Transitional Facilities/Short-term</b> <i>(e.g. temporary or transitional arrangement)</i>	1	
	<b>Temporary/Non-Permanent Housing arrangement</b> <i>(e.g. gave up lease, and moved in with family or friends but expects to live there less than 90 days)</i>	0	
	Emergency Shelter/street		<i>Unstable Arrangements</i>
	Jail/Prison	1	
	Disconnected	1	
	Death	0	<i>Life Event</i>
	1a. Total number of those households that received STRMU Assistance in the operating year of this report that also received STRMU assistance in the prior operating year (e.g. households that received STRMU assistance in two consecutive operating years).		
1b. Total number of those households that received STRMU Assistance in the operating year of this report that also received STRMU assistance in the two prior operating years (e.g. households that received STRMU assistance in three consecutive operating years).			20

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

#### 1a. Total Number of Households

Line [1]: For project sponsors that provided HOPWA housing subsidy assistance during the operating year identify in the appropriate row the number of households that received HOPWA housing subsidy assistance (TBRA, STRMU, Facility-Based, PHP and Master Leasing) and HOPWA funded case management services. Use Row c to adjust for duplication among the service categories and Row d to provide an unduplicated household total.

Line [2]: For project sponsors that did NOT provide HOPWA housing subsidy assistance identify in the appropriate row the number of households that received HOPWA funded case management services.

**Note:** These numbers will help you to determine which clients to report Access to Care and Support Outcomes for and will be used by HUD as a basis for analyzing the percentage of households who demonstrated or maintained connections to care and support as identified in Chart 1b below.

Total Number of Households	
<b>1. For Project Sponsors that provided HOPWA Housing Subsidy Assistance:</b> Identify the total number of households that received the following HOPWA-funded services:	
a. Housing Subsidy Assistance (duplicated)-TBRA, STRMU, PHP, Facility-Based Housing, and Master Leasing	189
b. Case Management	330
c. Adjustment for duplication (subtraction)	189
<b>d. Total Households Served by Project Sponsors with Housing Subsidy Assistance (Sum of Rows a and b minus Row c)</b>	<b>330</b>
<b>2. For Project Sponsors did NOT provide HOPWA Housing Subsidy Assistance:</b> Identify the total number of households that received the following HOPWA-funded service:	
a. HOPWA Case Management	0
<b>b. Total Households Served by Project Sponsors without Housing Subsidy Assistance</b>	<b>0</b>

#### 1b. Status of Households Accessing Care and Support

Column [1]: Of the households identified as receiving services from project sponsors that provided HOPWA housing subsidy assistance as identified in Chart 1a, Row 1d above, report the number of households that demonstrated access or maintained connections to care and support within the operating year.

Column [2]: Of the households identified as receiving services from project sponsors that did NOT provide HOPWA housing subsidy assistance as reported in Chart 1a, Row 2b, report the number of households that demonstrated improved access or maintained connections to care and support within the operating year.

**Note:** For information on types and sources of income and medical insurance/assistance, refer to Charts below.

Categories of Services Accessed	[1] For project sponsors that provided HOPWA housing subsidy assistance, identify the households who demonstrated the following:	[2] For project sponsors that did NOT provide HOPWA housing subsidy assistance, identify the households who demonstrated the following:	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing	330	0	Support for Stable Housing
2. Had contact with case manager/benefits counselor consistent with the schedule specified in client's individual service plan (may include leveraged services such as Ryan White Medical Case Management)	330	0	Access to Support
3. Had contact with a primary health care provider consistent with the schedule specified in client's individual service plan	330	0	Access to Health Care
4. Accessed and maintained medical insurance/assistance	330	0	Access to Health Care
5. Successfully accessed or maintained qualification for sources of income	330	0	Sources of Income

#### Chart 1b, Line 4: 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 use local program name</li> <li>MEDICARE Health Insurance Program, or use local program name</li> </ul> | <ul style="list-style-type: none"> <li>Veterans Affairs Medical Services</li> <li>AIDS Drug Assistance Program (ADAP)</li> <li>State Children's Health Insurance Program (SCHIP), or use local program name</li> </ul> | <ul style="list-style-type: none"> <li>Ryan White-funded Medical or Dental Assistance</li> </ul> |
|--|--|--|

**Chart 1b, Row 5: Sources of Income include, but are not limited to the following (Reference only)**

<ul style="list-style-type: none"> <li>• Earned Income</li> <li>• Veteran’s Pension</li> <li>• Unemployment Insurance</li> <li>• Pension from Former Job</li> <li>• Supplemental Security Income (SSI)</li> </ul>	<ul style="list-style-type: none"> <li>• Child Support</li> <li>• Social Security Disability Income (SSDI)</li> <li>• Alimony or other Spousal Support</li> <li>• Veteran’s Disability Payment</li> <li>• Retirement Income from Social Security</li> <li>• Worker’s Compensation</li> </ul>	<ul style="list-style-type: none"> <li>• General Assistance (GA), or use local program name</li> <li>• Private Disability Insurance</li> <li>• Temporary Assistance for Needy Families (TANF)</li> <li>• Other Income Sources</li> </ul>
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**1c. Households that Obtained Employment**

Column [1]: Of the households identified as receiving services from project sponsors that provided HOPWA housing subsidy assistance as identified in Chart 1a, Row 1d above, report on the number of 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.

Column [2]: Of the households identified as receiving services from project sponsors that did NOT provide HOPWA housing subsidy assistance as reported in Chart 1a, Row 2b, report on the number of 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 case management/counseling services.

*Note: This includes jobs created by this project sponsor or obtained outside this agency.*

*Note: Do not include jobs that resulted from leveraged job training, employment assistance, education or case management/counseling services.*

Categories of Services Accessed	[1] For project sponsors that provided HOPWA housing subsidy assistance, identify the households who demonstrated the following:	[2] For project sponsors that did NOT provide HOPWA housing subsidy assistance, identify the households who demonstrated the following:
Total number of households that obtained an income-producing job	13	0

**End of PART 4**



**PART 5: Worksheet - Determining Housing Stability Outcomes (optional)**

1. This chart is designed to assess program results based on the information reported in Part 4 and to help Grantees determine overall program performance. Completion of this worksheet is optional.

<b>Permanent Housing Subsidy Assistance</b>	<b>Stable Housing</b> (# of households remaining in program plus 3+4+5+6)	<b>Temporary Housing</b> (2)	<b>Unstable Arrangements</b> (1+7+8)	<b>Life Event</b> (9)
Tenant-Based Rental Assistance (TBRA)				
Permanent Facility-based Housing Assistance/Units				
Transitional/Short-Term Facility-based Housing Assistance/Units				
<b>Total Permanent HOPWA Housing Subsidy Assistance</b>				
<b>Reduced Risk of Homelessness: Short-Term Assistance</b>	<b>Stable/Permanent Housing</b>	<b>Temporarily Stable, with Reduced Risk of Homelessness</b>	<b>Unstable Arrangements</b>	<b>Life Events</b>
Short-Term Rent, Mortgage, and Utility Assistance (STRMU)				
<b>Total HOPWA Housing Subsidy 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 subsidy 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: Annual Report of Continued Usage for HOPWA Facility-Based Stewardship Units (ONLY)**

The Annual Report of Continued Usage for HOPWA Facility-Based Stewardship Units is to be used in place of Part 7B of the CAPER if the facility was originally acquired, rehabilitated or constructed/developed in part with HOPWA funds but no HOPWA funds were expended during the operating year. Scattered site units may be grouped together on one page.

Grantees that used HOPWA funding for new construction, acquisition, or substantial rehabilitation are required to operate their facilities for HOPWA eligible individuals for at least ten (10) years. If non-substantial rehabilitation funds were used, they are required to operate for at least three (3) years. Stewardship begins once the facility is put into operation.

*Note: See definition of Stewardship Units.*

**1. General information**

HUD Grant Number(s)	<b>Operating Year for this report</b> 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 Non-HOPWA Expenditures**

Facility Name:	Number of Stewardship Units Developed with HOPWA funds	Amount of Non-HOPWA Funds Expended in Support of the Stewardship Units during the Operating Year
Total Stewardship Units (subject to 3- or 10- year use periods)		

**3. Details of Project Site**

Project Sites: Name of HOPWA-funded project	
Site Information: Project Zip Code(s)	
Site Information: 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
<b>If the site is not confidential:</b> Please provide the contact information, phone, email address/location, if business address is different from facility address	

**End of PART 6**

**Part 7: Summary Overview of Grant Activities****A. Information on Individuals, Beneficiaries, and Households Receiving HOPWA Housing Subsidy Assistance (TBRA, STRMU, Facility-Based Units, Permanent Housing Placement and Master Leased Units ONLY)**

*Note: Reporting for this section should include ONLY those individuals, beneficiaries, or households that received and/or resided in a household that received HOPWA Housing Subsidy Assistance as reported in Part 3, Chart 1, Row 7, Column b. (e.g., do not include households that received HOPWA supportive services ONLY).*

**Section 1. HOPWA-Eligible Individuals Who Received HOPWA Housing Subsidy Assistance****a. Total HOPWA Eligible Individuals Living with HIV/AIDS**

In Chart a., provide the total number of eligible (and unduplicated) low-income individuals living with HIV/AIDS who qualified their household to receive HOPWA housing subsidy assistance during the operating year. This total should include only the individual who qualified the household for HOPWA assistance, NOT all HIV positive individuals in the household.

<b>Individuals Served with Housing Subsidy Assistance</b>	<b>Total</b>
Number of individuals with HIV/AIDS who qualified their household to receive HOPWA housing subsidy assistance.	137

**Chart b. Prior Living Situation**

In Chart b, report the prior living situations for all Eligible Individuals reported in Chart a. In Row 1, report the total number of individuals who continued to receive HOPWA housing subsidy assistance from the prior operating year into this operating year. In Rows 2 through 17, indicate the prior living arrangements for all new HOPWA housing subsidy assistance recipients during the operating year.

**Data Check:** *The total number of eligible individuals served in Row 18 equals the total number of individuals served through housing subsidy assistance reported in Chart a above.*

<b>Category</b>		<b>Total HOPWA Eligible Individuals Receiving Housing Subsidy Assistance</b>
1.	<u>Continuing</u> to receive HOPWA support from the prior operating year	104
<b>New Individuals who received HOPWA Housing Subsidy Assistance support during Operating Year</b>		
2.	Place not meant for human habitation (such as a vehicle, abandoned building, bus/train/subway station/airport, or outside)	6
3.	Emergency shelter (including hotel, motel, or campground paid for with emergency shelter voucher)	2
4.	Transitional housing for homeless persons	0
5.	<b>Total number of new Eligible Individuals who received HOPWA Housing Subsidy Assistance with a Prior Living Situation that meets HUD definition of homelessness (Sum of Rows 2 – 4)</b>	33
6.	Permanent housing for formerly homeless persons (such as Shelter Plus Care, SHP, or SRO Mod Rehab)	0
7.	Psychiatric hospital or other psychiatric facility	0
8.	Substance abuse treatment facility or detox center	0
9.	Hospital (non-psychiatric facility)	0
10.	Foster care home or foster care group home	0
11.	Jail, prison or juvenile detention facility	1
12.	Rented room, apartment, or house	13
13.	House you own	2
14.	Staying or living in someone else's (family and friends) room, apartment, or house	6
15.	Hotel or motel paid for without emergency shelter voucher	1
16.	Other	0
17.	Don't Know or Refused	2
18.	<b>TOTAL Number of HOPWA Eligible Individuals (sum of Rows 1 and 5-17)</b>	33

**c. Homeless Individual Summary**

In Chart c, indicate the number of eligible individuals reported in Chart b, Row 5 as homeless who also are homeless Veterans and/or meet the definition for Chronically Homeless (See Definition section of CAPER). The totals in Chart c do not need to equal the total in Chart b, Row 5.

Category	Number of Homeless Veteran(s)	Number of Chronically Homeless
HOPWA eligible individuals served with HOPWA Housing Subsidy Assistance	1	3

**Section 2. Beneficiaries**

In Chart a, report the total number of HOPWA eligible individuals living with HIV/AIDS who received HOPWA housing subsidy assistance (as reported in Part 7A, Section 1, Chart a), and all associated members of their household who benefitted from receiving HOPWA housing subsidy assistance (resided with HOPWA eligible individuals).

*Note: See definition of HOPWA Eligible Individual*

*Note: See definition of Transgender.*

*Note: See definition of Beneficiaries.*

**Data Check:** The sum of each of the Charts b & c on the following two pages equals the total number of beneficiaries served with HOPWA housing subsidy assistance as determined in Chart a, Row 4 below.

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

Individuals and Families Served with HOPWA Housing Subsidy Assistance	Total Number
1. Number of individuals with HIV/AIDS who qualified the household to receive HOPWA housing subsidy assistance (equals the number of HOPWA Eligible Individuals reported in Part 7A, Section 1, Chart a)	137
2. Number of ALL other persons <b>diagnosed</b> as HIV positive who reside with the HOPWA eligible individuals identified in Row 1 and who benefitted from the HOPWA housing subsidy assistance	2
3. Number of ALL other persons <b>NOT diagnosed</b> as HIV positive who reside with the HOPWA eligible individual identified in Row 1 and who benefitted from the HOPWA housing subsidy	80
<b>4. TOTAL number of ALL <u>beneficiaries</u> served with Housing Subsidy Assistance (Sum of Rows 1, 2, &amp; 3)</b>	219

**b. Age and Gender**

In Chart b, indicate the Age and Gender of all beneficiaries as reported in Chart a directly above. Report the Age and Gender of all HOPWA Eligible Individuals (those reported in Chart a, Row 1) using Rows 1-5 below and the Age and Gender of all other beneficiaries (those reported in Chart a, Rows 2 and 3) using Rows 6-10 below. The number of individuals reported in Row 11, Column E. equals the total number of beneficiaries reported in Part 7, Section 2, Chart a, Row 4.

<b>HOPWA Eligible Individuals (Chart a, Row 1)</b>						
		<b>A.</b>	<b>B.</b>	<b>C.</b>	<b>D.</b>	<b>E.</b>
		<b>Male</b>	<b>Female</b>	<b>Transgender M to F</b>	<b>Transgender F to M</b>	<b>TOTAL (Sum of Columns A-D)</b>
1.	Under 18	0	0	0	0	0
2.	18 to 30 years	17	4	3	0	24
3.	31 to 50 years	51	18	11	11	71
4.	51 years and Older	30	11	0	11	42
5.	<b>Subtotal (Sum of Rows 1-4)</b>	98	33	4	22	137
<b>All Other Beneficiaries (Chart a, Rows 2 and 3)</b>						
		<b>A.</b>	<b>B.</b>	<b>C.</b>	<b>D.</b>	<b>E.</b>
		<b>Male</b>	<b>Female</b>	<b>Transgender M to F</b>	<b>Transgender F to M</b>	<b>TOTAL (Sum of Columns A-D)</b>
6.	Under 18	29	26	0	0	55
7.	18 to 30 years	3	9	0	0	12
8.	31 to 50 years	6	5	0	0	11
9.	51 years and Older	2	2	0	0	4
10.	<b>Subtotal (Sum of Rows 6-9)</b>	40	42	0	0	82
<b>Total Beneficiaries (Chart a, Row 4)</b>						
11.	<b>TOTAL (Sum of Rows 5 &amp; 10)</b>	138	75	4	22	219

**c. Race and Ethnicity\***

In Chart c, indicate the Race and Ethnicity of all beneficiaries receiving HOPWA Housing Subsidy Assistance as reported in Section 2, Chart a, Row 4. Report the race of all HOPWA eligible individuals in Column [A]. Report the ethnicity of all HOPWA eligible individuals in column [B]. Report the race of all other individuals who benefitted from the HOPWA housing subsidy assistance in column [C]. Report the ethnicity of all other individuals who benefitted from the HOPWA housing subsidy assistance in column [D]. The summed total of columns [A] and [C] equals the total number of beneficiaries reported above in Section 2, Chart a, Row 4.

Category		HOPWA Eligible Individuals		All Other Beneficiaries	
		[A] Race [all individuals reported in Section 2, Chart a, Row 1]	[B] Ethnicity [Also identified as Hispanic or Latino]	[C] Race [total of individuals reported in Section 2, Chart a, Rows 2 & 3]	[D] Ethnicity [Also identified as Hispanic or Latino]
1.	American Indian/Alaskan Native	8	1	3	0
2.	Asian	1	0	1	0
3.	Black/African American	73	2	21	2
4.	Native Hawaiian/Other Pacific Islander	3	2	1	0
5.	White	77	8	12	4
6.	American Indian/Alaskan Native & White	2	1	0	0
7.	Asian & White	1	0	1	0
8.	Black/African American & White	4	1	1	1
9.	American Indian/Alaskan Native & Black/African American	4	0	0	0
10.	Other Multi-Racial	2	0	2	0
11.	Column Totals (Sum of Rows 1-10)	175	15	42	7
<b>Data Check:</b> Sum of Row 11 Column A and Row 11 Column C equals the total number HOPWA Beneficiaries reported in Part 3A, Section 2, Chart a, Row 4.					

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

**Section 3. Households**

**Household Area Median Income**

Report the income(s) for all households served with HOPWA housing subsidy assistance.

**Data Check:** The total number of households served with HOPWA housing subsidy assistance should equal Part 3C, Row 7, Column b and Part 7A, Section 1, Chart a. (Total HOPWA Eligible Individuals Served with HOPWA Housing Subsidy Assistance).

**Note:** Refer to <https://www.huduser.gov/portal/datasets/il.html> for information on area median income in your community.

Percentage of Area Median Income		Households Served with HOPWA Housing Subsidy Assistance
1.	0-30% of area median income (extremely low)	109
2.	31-50% of area median income (very low)	22
3.	51-80% of area median income (low)	6
4.	<b>Total (Sum of Rows 1-3)</b>	137

**Part 7: Summary Overview of Grant Activities**

**B. Facility-Based Housing Assistance**

Complete one Part 7B for each facility developed or supported through HOPWA funds.

**Do not complete this Section for programs originally developed with HOPWA funds but no longer supported with HOPWA funds.** If a facility was developed with HOPWA funds (subject to ten years of operation for acquisition, new construction and substantial rehabilitation costs of stewardship units, or three years for non-substantial rehabilitation costs), but HOPWA funds are no longer used to support the facility, the project sponsor should complete Part 6: Continued Usage for HOPWA Facility-Based Stewardship Units (ONLY).

Complete Charts 2a, Project Site Information, and 2b, Type of HOPWA Capital Development Project Units, for all Development Projects, including facilities that were past development projects, but continued to receive HOPWA operating dollars this reporting year.

**1. Project Sponsor Agency Name (Required)**

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**2. Capital Development**

**2a. Project Site Information for HOPWA Capital Development of Projects (For Current or Past Capital Development Projects that receive HOPWA Operating Costs this reporting year)**

*Note: If units are scattered-sites, report on them as a group and under type of Facility write "Scattered Sites."*

	Type of Development this operating year	HOPWA Funds Expended this operating year (if applicable)	Non-HOPWA funds Expended (if applicable)	Name of Facility:
	<input type="checkbox"/> New construction	\$	\$	<b>Type of Facility [Check <u>only one</u> box.]</b> <input type="checkbox"/> Permanent housing <input type="checkbox"/> Short-term Shelter or Transitional housing <input type="checkbox"/> Supportive services only facility
	<input type="checkbox"/> Rehabilitation	\$	\$	
	<input type="checkbox"/> Acquisition	\$	\$	
	<input type="checkbox"/> Operating	\$	\$	
a.	Purchase/lease of property:		Date (mm/dd/yy):	
b.	Rehabilitation/Construction Dates:		Date started:	Date Completed:
c.	Operation dates:		Date residents began to occupy: <input type="checkbox"/> Not yet occupied	
d.	Date supportive services began:		Date started: <input type="checkbox"/> Not yet providing services	
e.	Number of units in the facility:		HOPWA-funded units =	Total Units =
f.	Is a waiting list maintained for the facility?		<input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, number of participants on the list at the end of operating year</i>	
g.	What is the address of the facility (if different from business address)?			
h.	Is the address of the project site confidential?		<input type="checkbox"/> Yes, protect information; do not publish list <input type="checkbox"/> No, can be made available to the public	



**2b. Number and Type of HOPWA Capital Development Project Units (For Current or Past Capital Development Projects that receive HOPWA Operating Costs this Reporting Year)**

For units entered above in 2a, please list the number of HOPWA units that fulfill the following criteria:

	Number Designated for the Chronically Homeless	Number Designated to Assist the Homeless	Number Energy-Star Compliant	Number 504 Accessible – Mobility Units - Sensory Units
Rental units constructed (new) and/or acquired with or without rehab				
Rental units rehabbed				
Homeownership units constructed (if approved)				

**3. Units Assisted in Types of Housing Facility/Units Leased by Project Sponsor**

Charts 3a, 3b, and 4 are required for each facility. In Charts 3a and 3b, indicate the type and number of housing units in the facility, including master leased units, project-based or other scattered site units leased by the organization, categorized by the number of bedrooms per unit.

*Note: The number units may not equal the total number of households served.*

**Please complete separate charts for each housing facility assisted. Scattered site units may be grouped together.**

**3a. Check one only**

- Permanent Supportive Housing Facility/Units
- Short-term Shelter or Transitional Supportive Housing Facility/Units

**3b. Type of Facility**

Complete the following Chart for all facilities leased, master leased, project-based, or operated with HOPWA funds during the reporting year.

**Name of Project Sponsor/Agency Operating the Facility/Leased Units:**

Type of housing facility operated by the project sponsor		Total Number of Units in use during the Operating Year Categorized by the Number of Bedrooms per Units				
		SRO/Studio/0 bdrm	1 bdrm	2 bdrm	3 bdrm	4 bdrm
a.	Single room occupancy dwelling					
b.	Community residence					
c.	Project-based rental assistance units or leased units					
d.	Other housing facility <u>Specify:</u>					

**4. Households and Housing Expenditures**

Enter the total number of households served and the amount of HOPWA funds expended by the project sponsor on subsidies for housing involving the use of facilities, master leased units, project based or other scattered site units leased by the organization.

Housing Assistance Category: Facility Based Housing		Output: Number of Households	Output: Total HOPWA Funds Expended during Operating Year by Project Sponsor
a.	Leasing Costs		
b.	Operating Costs		
c.	Project-Based Rental Assistance (PBRA) or other leased units		
d.	Other Activity (if approved in grant agreement) <u>Specify:</u>		
e.	<b>Adjustment to eliminate duplication (subtract)</b>		
f.	<b>TOTAL Facility-Based Housing Assistance (Sum Rows a through d minus Row e)</b>		