



Consolidated Annual Performance and Evaluation Report for Program Year 2014

Tulsa County HOME Consortium

And

Tulsa County Community Development Block
Grant Urban County Program

Prepared by INCOG

September 15, 2015

PROGRAM YEAR 2014

CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT

EXECUTIVE SUMMARY

This Consolidated Annual Performance and Evaluation Report (CAPER) is designed to report on the progress of the Tulsa County HOME Consortium and the Tulsa County Community Development Block Grant (CDBG) Urban County programs in carrying out the housing and community development goals and objectives set out in its Fiscal Year 2014 Annual Action Plan. The Program Year/Fiscal Year for this report began July 1, 2014 and ended June 30, 2015. In addition, this report provides an opportunity for the HOME Consortium and CDBG Urban County programs to assess annual performance in relationship to meeting overall priorities and objectives stated in the Five-year Consolidated Plan, and to discuss what actions or changes are contemplated as a result of annual performance of the programs.

The 24 communities within the HOME Consortium's jurisdictions covered by this CAPER are: Bartlesville, Bixby, Bristow, Broken Arrow, Catoosa, Claremore, Collinsville, Coweta, Drumright, Glenpool, Hominy, Jenks, Owasso, Pawhuska, Sand Springs, Sapulpa, Skiatook, Sperry, and the unincorporated areas of Creek, Osage, Rogers, Tulsa, Wagoner, and Washington Counties. The HOME Consortium receives a direct allocation of HOME Investment Partnership funds from the U.S. Department of Housing and Urban Development.

The Tulsa County CDBG Urban County is comprised of Tulsa County and the Cities of Bixby, Broken Arrow, Collinsville, Glenpool, Jenks, Owasso, Sand Springs, Sapulpa, Skiatook, and Sperry. The Tulsa County CDBG Urban County receives a direct allocation from the U.S. Department of Housing and Urban Development in the Community Development Block Grant Program. HOME Consortium communities that are not a part of the CDBG Urban County may apply for Community Development Block Grants through the State of Oklahoma program administered by the Oklahoma Department of Commerce.

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$1,827,018.23

During the FY 2014 program year, funds were spent on the following HOME activities:

Homebuyer Assistance (Downpayment & closing costs):

Twenty three (23) households were assisted in the purchase of homes through assistance in downpayment and closing cost forgivable loans. Through this program, mortgages in the amount of \$1,842,904.00 were executed with local lending institutions.

Total Expended in Program Year: \$90,980.00

Innovative Housing Initiatives:

The new construction of seven (7) single family housing units for sale to income eligible homebuyers in Bristow and Drumright, Creek County, and Tiawah, Rogers County were substantially completed and began marketing to eligible homebuyers. The seven units were in the final construction phase at the end of the program year.

Total Expended in Program Year: \$317,514.77

Rental Housing

During the FY2013 program year, funds were awarded to Mental Health Association in Tulsa for capital improvement projects at two (2) low income multi-family apartment complexes owned by MHAT, Abbey Road and Autumn Road. Construction on the two apartment complexes was initiated during the FY2014 program year and substantially completed during the FY2014 year. The capital improvement projects assisted in providing safe and affordable housing for low-income households, homeless and chronically homeless families and individuals and those at risk of homelessness. The amount of HOME funds requested by MHAT was \$1,386,539.32.

Total Expended in Program Year: \$1,358,924.70

HOME Program Administration:

Administration and program compliance activity.

Total Expended in Program Year: \$59,598.75

Administration costs of general program; financial and program compliance; development of prospective housing activities.

Tulsa County CDBG Urban County:

Total CDBG Funds Expended During Program Year: \$1,492,176.27

During the program year, funds were spent on the following CDBG activities from FY2009, FY2010, FY 2011, FY2012, FY2013 and FY2014 programs:

2014 Program Year Major Initiatives and Highlights

<u>Program Yr.</u>	<u>Activity #</u>	<u>Activity Name</u>	<u>Status</u>	<u>Expenditures</u>
2014	1066	Broken Arrow Old Town Street Improvements	Under Cons.	\$81,210.31

	1047	Glenpool Senior Center Renovations	Completed	\$43,915.00
2013	1063	Broken Arrow Old Town Street Improvements	Completed	\$380,631.00
	1039	Owasso Rayola Park Improvements	Completed	\$121,207.00
	1049	Sand Springs Old Town Sewer Improvements	Completed	\$51,481.62
	1044	Skiatook Senior Center Construction	Completed	\$73,641.00
2012	1038	Broken Arrow Central Park Sports Courts	Completed	\$139,730.51
	1043	Skiatook Senior Center Construction	Completed	\$69,097.00
	1021	Tulsa County Demolitions of Structures	Under Cons.	\$33,935.80
	1049	Sand Springs Waterline Improvements	Completed	\$32,339.00
2011	1038	Broken Arrow Central Park Sports Courts	Completed	\$120,556.66
	1049	Sand Springs Sewer Improvements	Completed	\$31,837.38
2010	1038	Broken Arrow Central Park Sports Courts	Completed	\$2,458.55
	967	Sperry Amory Windows Replacement	Completed	\$3,813.25
2009	1038	Broken Arrow Central Park Sports Courts	Completed	\$93,335.79

Infrastructure

Total Expended:

\$1,279,189.87

Social Services

Funding to five agencies to provide services to Broken Arrow low income residents

Total Expended: \$65,266.60

General Program Administration:

Administration and program compliance activity.

Total Expended: \$147,719.80

CAPER Document:

Copies of this document can be obtained by contacting the INCOG office at Two West Second Street, Suite 800, Tulsa, OK 74103, (918) 584-7526.

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.

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$1,827,018.23

Homebuyer Assistance (Downpayment & closing costs): \$90,980.00

Innovative Housing Initiatives (New Construction of SF Housing): \$317,514.77

Rental Housing (Rehab of 2 apartment complexes): \$1,358,924.70

HOME Program Administration: \$59,598.75

Tulsa County CDBG Urban County:

Total CDBG Funds Expended During Program Year: \$1,492,176.27

During the program year, funds were spent on CDBG activities from FY2009, FY2010, FY 2011, FY2012, FY2013 and FY2014 programs:

Infrastructure: \$1,279,189.87

Social Services: \$65,266.60

General Program Administration: \$147,719.80

See uploaded document 2014 Program Highlights pages 1 through 5 for discussion of major initiatives and highlights of program year. Several of the Urban County members impacted by the delayed Congressional Release of Funds during this 2013 Program Year, who did not receive the

FY2013 allocation release until January 2014 instead of July 1, 2013, made significant progress in completing or drawing funds. Broken Arrow, Glenpool, Owasso, Sapulpa, and Skiatook completed FY2013 projects.

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.

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Construction of Public Facilities and Services	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	21385	4002	18.71%	0	4002	
Construction of Public Facilities and Services	Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	19925	14441	72.48%	4277	14441	337.64%
Construction of Public Infrastructure	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	14285	1765	12.36%	2857	1765	61.78%

Homeownership Opportunities for Low Income	Affordable Housing	HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	60	0	0.00%			
New Construction of Single Family Homes	Affordable Housing	HOME: \$	Homeowner Housing Added	Household Housing Unit	4	0	0.00%			
Rental Housing for Elderly	Affordable Housing	HOME: \$	Rental units constructed	Household Housing Unit	120	0	0.00%	40	0	0.00%

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 Urban County’s CDBG activities are selected by the individual communities who are members of the Urban County, and activities are not priority based. Additionally, the only activities captured in the 2014 Performance Report by IDIS are those 2014 activities listed as completed in the system. The numerous activities completed during the performance year which were funded through prior year funding are not captured in the accomplishment table.

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)

	CDBG	HOME
White	15,778	89
Black or African American	234	1
Asian	333	0
American Indian or American Native	576	3
Native Hawaiian or Other Pacific Islander	0	0
Total	16,921	93
Hispanic	181	1
Not Hispanic	16,740	92

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

Narrative

In FY14 there were 23 households that received MTHC homebuyer assistance through Community Action Resource and Development (CARD). A total of 20 of the households were identified as White with one of those households identified as White-Hispanic. Two households were identified as American Indian or Native American and one household was identified as Black. Twelve households had children and ten households were identified as single-non elderly.

Additionally, the racial and ethnic composition reported in the table above for the CDBG activities are the number of households assisted through the City of Broken Arrow's Public Service activities, and reflect in general the demographic composition of that community.

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		3,919,847	1,492,176
HOME		2,261,754	1,827,018

Table 3 - Resources Made Available

Narrative

The Actual Amount Expended is the amount expended on activities during the performance period and appears to exceed the amount anticipated due to expenditure of funds from prior years. The amount expended for Program Year 2014 is higher than in previous years because a number of prior year projects were completed in the reporting period.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description

Table 4 – Identify the geographic distribution and location of investments

Narrative

The Action Plan did not identify Target Areas for distribution of funds. During the performance year, HOME funds were expended in various communities within the HOME Consortium service area of 6 counties and 18 cities. Homebuyer Assistance was provided to purchase homes in Bartlesville, Bixby, Claremore, Collinsville, and Sperry. New housing was under construction in Bristow and Drumright. CDBG funds were expended within the 10 communities who are members of the Urban County.

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.

Matching funds for the HOME program were generated through foregone T-bill interest rates for the Homebuyer Assistance program. Additionally, many of the CDBG Urban County communities provided leveraged funds to contribute to their individual projects.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	3,315,051
2. Match contributed during current Federal fiscal year	46,066
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	3,361,117
4. Match liability for current Federal fiscal year	441,855
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	2,919,262

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
1024	05/16/2014	0	134	0	0	0	0	134
1025	05/02/2014	0	2,538	0	0	0	0	2,538
1027	05/15/2014	0	1,439	0	0	0	0	1,439
1028	05/02/2014	0	1,020	0	0	0	0	1,020
1029	06/13/2014	0	10,565	0	0	0	0	10,565
1031	07/24/2014	0	212	0	0	0	0	212
1032	07/08/2014	0	2,522	0	0	0	0	2,522
1034	08/07/2014	0	1,615	0	0	0	0	1,615
1035	08/15/2014	0	1,463	0	0	0	0	1,463
1040	09/19/2014	0	2,942	0	0	0	0	2,942
1041	09/22/2014	0	2,872	0	0	0	0	2,872
1046	09/30/2014	0	5,565	0	0	0	0	5,565
1050	11/07/2014	0	2,281	0	0	0	0	2,281
1051	09/10/2014	0	2,923	0	0	0	0	2,923
1052	11/19/2014	0	902	0	0	0	0	902
1053	11/20/2014	0	615	0	0	0	0	615
1062	01/09/2015	0	6,458	0	0	0	0	6,458
							Total	\$46,066

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	0	0	0	0

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	
Contracts						
Dollar Amount	1,755,923	0	0	0	0	1,755,923
Number	1	0	0	0	0	1
Sub-Contracts						
Number	14	1	0	0	1	12
Dollar Amount	1,050,120	24,498	0	0	32,696	992,926
	Total	Women Business Enterprises	Male			
Contracts						
Dollar Amount	1,755,923	0	1,755,923			
Number	1	0	1			
Sub-Contracts						
Number	14	4	10			
Dollar Amount	1,050,120	355,878	694,242			

Table 8 – Minority Business and Women Business Enterprises

Minority Owners of Rental Property – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	1	0	0	0	0	1
Dollar Amount	1,358,924	0	0	0	0	1,358,924

Table 9 – Minority Owners of Rental Property

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						
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	189
Number of Non-Homeless households to be provided affordable housing units	0	0
Number of Special-Needs households to be provided affordable housing units	0	0
Total	0	189

Table 11 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	0
Number of households supported through The Production of New Units	40	7
Number of households supported through Rehab of Existing Units	0	189
Number of households supported through Acquisition of Existing Units	0	23
Total	40	219

Table 12 – Number of Households Supported

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

Several projects identified in prior years' Action Plans were completed during the FY2014 Program Year, and are reported in the above table. While the project described in the FY2014 Action Plan, the creation of 40 elderly rental units, did not occur during the program year, significant assistance for affordable housing to low-income households was demonstrated through this year's HOME program. The major obstacle to meeting the FY2014 Goal of the production of 40 new rental elderly units was the inability to have the HOME project funded with LITC from OHFA due to scoring criteria giving preference to new projects located in Qualified Census Tracts. The HOME Consortium service area contains few QCTs and those QCTs are located in areas that provide few if any services for elderly persons, making the QCT a bad location for a fragile population.

Discuss how these outcomes will impact future annual action plans.

Meeting future Action Plan Goals of creating new rental units for the elderly, a critical need in the Consortium service area, will continue to be difficult due to continued scoring criteria by OHFA. This activity is the signature development of the Consortium and the inability to provide affordable units for the elderly will leave gaping hole in the quality of life of the elderly population of the area.

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 Persons Served	CDBG Actual	HOME Actual
Extremely Low-income	0	190
Low-income	0	15
Moderate-income	0	14
Total	0	219

Table 13 – Number of Persons Served

Narrative Information

Twenty-three (23) low income households (with a total population of 49 persons) received MTHC homebuyer assistance to purchase homes within the Consortium jurisdiction during FY14. A total of \$90,980.00 in HOME funds expended with funding coming from a previous year allocation. Of the 23 households that were assisted, 7 were 60-80% of (MFI) income; 9 were 50-60%; 6 were 30-50% of (MFI) income; and 1 was 0-30% of (MFI) income.

Assistance was provided to MHAT in the rehabilitation of two apartment complexes to provide affordable rental housing to homeless households. All 189 units rehabbed through this project housed households who were low 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

INCOG staff members are voting members on the *A Way Home for Tulsa* Governance Council. In addition, INCOG staff members serve on the Housing Plus Subcommittee and the AWH4T Finance Subcommittee. The AWH4T Governance Council and the Community Service Council of Greater Tulsa staff oversee the Tulsa County Continuum of Care application process. INCOG staff members participate in the annual one-night consumer survey of the homeless that is conducted by the provider agencies in the Tulsa area. INCOG staff members have been part of the Broken Arrow PIT survey for the past eight years. The 2015 Point-in-Time survey was held on the night of Thursday, January 29, 2015.

Addressing the emergency shelter and transitional housing needs of homeless persons

The MTHC Consortium does not receive Emergency Solutions Grant (ESG) funding. The MTHC Consortium does not allocate or receive funding from the Tulsa-Tulsa County-Broken Arrow CoC - Continuum of Care. INCOG staff members do participate in the local meetings of the Governance Board of AWH4T-A Way Home for Tulsa and the Homeless Services Network. The emergency shelters that serve the City of Tulsa also serve the suburban and outlying communities in the MTHC area. The provider agencies that are members of the AWH4T and the Homeless Services Network all provide some level of transitional housing with the goal of finding permanent supportive housing for all of their clients. There is special emphasis on housing chronically homeless individuals and homeless veterans.

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

In past years, the MTHC Consortium did not receive or allocate funding for housing activities that impacted the lives of homeless persons or at-risk/potentially homeless individuals and families. This situation began to change in 2009 with the administration of three years of Tulsa County HPRP funds that were first used to relocate the residents of the Downtown YMCA which was permanently closed. The balance of the Tulsa County HPRP funds were used to assist at-risk households in Tulsa County. A

more recent action is the use of FY 2011 HOME funds from the MTHC Consortium for two rental rehabilitation projects in association with the Mental Health Association in Tulsa. The renovation of two existing apartment complexes in the City of Tulsa with MTHC HOME funds will provide permanent supportive housing units for MHAT clients. The projects are Autumn Ridge at 17th & South Memorial Road and Abbey Road near 43rd Street and South Peoria. The renovation work on these two locations is almost complete as of the end date of the FY14 CAPER 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 recent HPRP funding that Tulsa County received was targeted for households that faced the possibility of becoming homeless (Homeless Prevention). The MHAT residential properties (Abbey Road & Autumn Ridge) have assisted persons who were presently homeless and also those at risk of becoming homeless.

CR-30 - Public Housing 91.220(h); 91.320(j)

Actions taken to address the needs of public housing

There are three public housing authorities in the MTHC Consortium Area: Bristow, Drumright, and Osage County. The Bristow PHA has 159 units, the Drumright PHA has 148 units, and the Osage County PHA has 280 units at six individual locations: Barnsdall, Cedar Ridge near Pawhuska, Fairfax, Hominy, Osage, and Shidler. The three public housing authorities in the MTHC area received annual Public Housing Capital Fund Program grants (CAP awards) for the continued maintenance and upgrade of their housing units. The FY15 CAP awards were Bristow \$152,457; Drumright \$156,220; and Osage County \$291,124. There are no plans to expand the current number of units at these locations. The MTHC Consortium is not a funding source for public housing agencies.

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

Any actions in this area would be initiated by the individual housing authorities.

Actions taken to provide assistance to troubled PHAs

None of the three Public Housing Authorities in the MTHC Consortium Area are designated as troubled PHA's.

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)

Several local governments in the Metropolitan Tulsa HOME Consortium have reviewed their local regulations and procedures concerning zoning, housing, and tax credit developments. The cities of Broken Arrow, Coweta, Owasso, and Sand Springs have adopted ordinances that outline the procedures to be followed by the local governing body when reviewing proposed developments financed in part with low income tax credits. These ordinances are in response to OHFA's request to formalize the review process for tax credit applications. Additionally, some cities have reviewed their zoning codes with regards to permissible location of group homes and other types of housing for the disabled. All of these actions have helped to streamline the review process for new affordable housing developments.

Fair Housing education is an important first step in eliminating any barriers to affordable housing that may be encountered by low income and minority citizens. Cities and counties in the MTHC Consortium all participate in the promotion of fair housing within their communities. All 24 local governments are current or former recipients of CDBG funds and have conducted activities to promote fair housing. Such activities have included promoting April as Fair Housing Month, adopting or updating local Fair Housing Ordinances, and making available a Fair Housing Brochure.

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

No additional actions undertaken.

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

During the FY2014 reporting period, Community Action Project Tulsa County (CAPTC) and Community Resource Development, Inc. (CARD) offered the various programs listed below in the MTHC Consortium area: Head Start provides comprehensive services in health/nutrition, parent involvement, disabilities, family literacy, social services and education. The Weatherization Program provides energy related cost cutting measures in older homes. Community Outreach and Development increases the level of self-sufficiency for low-income individuals and groups through development of the self-help and management skills needed to operate effectively. Services include In-home care, educational programs, community organization, information and referral and community networking. Youth Programs are designed to create employment and training opportunities for low income youths. The CARD Homeless

Program provides financial assistance, case management, counseling and available resources to individuals and families who are homeless or at risk of being homeless. Emergency Assistance provides food, shelter, utility assistance, clothing, medical treatment and support for individuals and families in emergency situations. Economic Development offers employment/ career counseling and training, assistance in business development and an entrepreneurial development support system. The Senior Nutrition and wellness program offers meals, transportation and social activities to area senior citizens. Finally, the CARD Referral system is an extensive referral system which contains information on employment, housing services, emergency services, lists of other social service agencies and the services they provide.

CAPTC has several programs that help low-income families develop assets and use them effectively so they may rise above the poverty level. CARD in Claremore provides social services to clients to assist them in emergency situations while helping clients journey out of poverty. In addition to the assistance described above, CARD provides prescription assistance, RX for Oklahoma, and emergency transportation assistance in the form of gasoline vouchers.

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

No gaps in institutional structure were identified in the FY14 Annual Action Plan. No changes are contemplated at this time.

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

No additional actions undertaken through HUD-funded programs. INCOG is administering a homelessness assistance grant through the Department of Health and Human Services, and this grant provides an intensive coordination of housing and social service agencies to support the grant.

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 HOME Consortium is a member of the Tulsa Area Fair Housing Partnership, a collaboration of local entities and agencies whose mission is to raise awareness of the right to equal opportunity in housing of all people in the metropolitan Tulsa area. During the reporting period, the Partnership assessed impediments to fair housing choices and directed efforts towards a variety of significant and high profile events and activities to bring attention to equal housing opportunity. The Strategic Plan of the Partnership addresses areas of housing issues to assist in overcoming effects of impediments.

Additionally, during the reporting period, each of the Urban County jurisdictions and all of the HOME Consortium member governments re-affirmed affirmatively furthering fair housing by adopting a

resolution proclaiming April as Fair Housing Month.

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

As a part of the annual review of the Tulsa County CDBG Urban County program, INCOG staff members monitored the following cities and CDBG subrecipient agencies during FY 2014:

City of Broken Arrow on June 30, 2015

CDBG Subrecipient Broken Arrow Neighbors on May 21, 2015

CDBG Subrecipient Broken Arrow Seniors on June 29, 2015

CDBG Subrecipient Child Abuse Network on June 29, 2015

INCOG staff members met with city staff to review items such as competitive bidding procedures, financial administration, fair housing activities, and other items administered at the local level. An onsite inspection of current CDBG projects was conducted in each community as well. INCOG staff also reviewed the City's current status in the *System for Award Management*. MTHC HOME Monitoring during FY14 was conducted at CARD-Community Action Resource & Development, Inc. in Claremore, Oklahoma (HOME – MTHC Subrecipient). The monitoring visit was held on June 19, 2015. INCOG staff monitored random files from the 23 homebuyer locations that were funded during fiscal year FY 2014. CARD is presently utilizing the balance of funds from its FY11 Homebuyer Assistance contract for this activity. There were no findings or major concerns identified by the staff during the FY 2014 CDBG or HOME monitoring visits.

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.

Following the adopted Tulsa County Citizen Participation Plan, a public hearing to review the FY 2014 performance of the Metropolitan Tulsa HOME Consortium and the CDBG Urban County was held during the regular Tulsa County Board of Commissioners meeting on Tuesday, September 8, 2015. Notification of the public hearing was published in the regional Tulsa World newspaper seven days prior to the hearing. Additionally, copies of the draft CAPER were posted on the Tulsa County and INCOG websites to allow public review of the document.

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 Urban County program focused efforts during the FY 2014 program year on establishing stricter expenditure ratio requirements from participating members in order to speed up the expenditure of grant funds. Due the expenditure of Prior Year funds, HUD found that the 1.5 timeliness was met by the Urban County during this performance year.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?	No
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[BEDI grantees] Describe accomplishments and program outcomes during the last year.

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

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.

Inspections of all individual units are conducted at all twelve of the Consortium-funded elderly apartment complexes on a monthly basis by the management company. Any identified deficiencies are addressed immediately through work orders. Additionally, administrative staff conducts an annual inspection of all the elderly complexes. During the reporting year, on-site inspections by inspection staff were conducted. No deficiencies were identified.

Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 92.351(b)

The Metropolitan Tulsa HOME Consortium developed and adopted an affirmative marketing plan in accordance with 24 CFR. 92.351 (b). Additionally, the Consortium has approved separate marketing plans for all twelve of the affordable housing developments for the elderly, funded with Consortium funds. All marketing plans are consistent with the affirmative marketing plan requirements specified in federal requirements.

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

During the 2014 Program Year, the HOME Consortium used \$11,467.18 in program income, which was applied to a Homebuyer Assistance (downpayment and closing costs) activity.

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)

All of the HOME Consortium's efforts during the program year were directed toward fostering and maintaining affordable housing. Each of the goals and objectives identified in the FY 2014 Action Plan were developed to promote housing opportunities for low income populations. The Consortium

constructed single family housing units for sale to income eligible homebuyers and provided financial assistance for families seeking to purchase housing. The Goal of creating elderly housing units identified in the 2014 Action Plan will occur in the 2015 program year, when funds from the two years will be combined to assist in the construction of elderly duplex units.



Office of Community Planning and Development
U.S. Department of Housing and Urban Development
Integrated Disbursement and Information System
PR26 - CDBG Financial Summary Report
Program Year 2014
TULSA COUNTY , OK

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PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	1,730,144.14
02 ENTITLEMENT GRANT	1,278,377.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	0.00
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 RETURNS	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	3,008,521.14

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	1,340,643.22
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	1,340,643.22
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	151,533.05
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	1,492,176.27
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,516,344.87

PART III: LOWMOD BENEFIT THIS REPORTING PERIOD

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	1,340,643.22
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	1,340,643.22
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: PY: PY:
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	0.00
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	109,181.60
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	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	109,181.60
32 ENTITLEMENT GRANT	1,278,377.00
33 PRIOR YEAR PROGRAM INCOME	0.00
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	1,278,377.00
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	8.54%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	151,533.05
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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	0.00
41	TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	151,533.05
42	ENTITLEMENT GRANT	1,278,377.00
43	CURRENT YEAR PROGRAM INCOME	0.00
44	ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45	TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	1,278,377.00
46	PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	11.85%

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	National Objective	Drawn Amount
2012	17	1043	5737018	City of Skiatook Senior Citizens Center Construction	LMC	\$69,097.00
2013	9	1044	5737018	City of Skiatook Senior Center Construction	LMC	\$2,138.85
2013	9	1044	5793920	City of Skiatook Senior Center Construction	LMC	\$71,502.15
Matrix Code 03A						\$142,738.00
2012	16	1038	5727752	Broken Arrow Sports Courts Construction	LMA	\$233,752.41
2012	16	1038	5765716	Broken Arrow Sports Courts Construction	LMA	\$108,409.74
2012	16	1038	5791257	Broken Arrow Sports Courts Construction	LMA	\$13,919.36
2013	8	1039	5732304	City of Owasso Rayola Park Improvements	LMA	\$94,210.00
2013	8	1039	5760598	City of Owasso Rayola Park Improvements	LMA	\$26,997.00
Matrix Code 03F						\$477,288.51
2013	6	1049	5751076	City of Sand Springs Old Town Sewer Improvements	LMA	\$115,658.00
Matrix Code 03J						\$115,658.00
2013	2	1063	5791257	City of Broken Arrow Street Improvements	LMA	\$190,474.40
2013	2	1063	5805880	City of Broken Arrow Street Improvements	LMA	\$190,156.60
2014	17	1066	5805880	City of Broken Arrow Old Town Streets	LMA	\$81,210.31
Matrix Code 03K						\$461,841.31
2012	15	1021	5760937	Tulsa County Oakhurst Demolition	LMA	\$33,935.80
Matrix Code 04						\$33,935.80
2013	12	1015	5727752	Broken Arrow Neighbors Outreach	LMC	\$5,585.36
2014	8	1054	5765735	Broken Arrow Neighbors Outreach	LMC	\$4,188.99
2014	8	1054	5791257	Broken Arrow Neighbors Outreach	LMC	\$5,585.32
2014	8	1054	5805880	Broken Arrow Neighbors Outreach	LMC	\$1,396.33
Matrix Code 05						\$16,756.00
2013	15	1018	5727752	Broken Arrow Seniors	LMC	\$3,141.75
2013	16	1019	5727752	Broken Arrow Neighbors Treetop Apartments Outreach	LMC	\$1,666.64
2014	11	1057	5765735	Broken Arrow Seniors	LMC	\$6,666.65
2014	11	1057	5791257	Broken Arrow Seniors	LMC	\$3,999.99
2014	11	1057	5805880	Broken Arrow Seniors	LMC	\$1,333.33
2014	12	1058	5765735	Broken Arrow Treetops Apartments Outreach	LMC	\$1,562.49

CAPER

29

2014	12	1058	5791257	Broken Arrow Treetops Apartments Outreach	LMC	\$2,083.32
2014	12	1058	5805880	Broken Arrow Treetops Apartments Outreach	LMC	\$520.83
2014	14	1047	5751076	City of Glenpool Senior Center Van	LMC	\$43,915.00
						Matrix Code 05A
						\$64,890.00
2013	13	1016	5727752	Margaret Hudson Counseling	LMC	\$1,710.73
2014	9	1055	5765735	Margaret Hudson Counseling	LMC	\$2,719.32
2014	9	1055	5791257	Margaret Hudson Counseling	LMC	\$2,788.26
						Matrix Code 05D
						\$7,218.31
2013	14	1017	5727752	Child Abuse Network	LMC	\$5,317.29
2014	10	1056	5791257	Child Abuse Network	LMC	\$12,396.03
2014	10	1056	5805880	Child Abuse Network	LMC	\$2,603.97
						Matrix Code 05N
						\$20,317.29
Total						\$1,340,643.22

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	National Objective	Drawn Amount
2013	12	1015	5727752	Broken Arrow Neighbors Outreach	LMC	\$5,585.36
2014	8	1054	5765735	Broken Arrow Neighbors Outreach	LMC	\$4,188.99
2014	8	1054	5791257	Broken Arrow Neighbors Outreach	LMC	\$5,585.32
2014	8	1054	5805880	Broken Arrow Neighbors Outreach	LMC	\$1,396.33
						Matrix Code 05
						\$16,756.00
2013	15	1018	5727752	Broken Arrow Seniors	LMC	\$3,141.75
2013	16	1019	5727752	Broken Arrow Neighbors Treetop Apartments Outreach	LMC	\$1,666.64
2014	11	1057	5765735	Broken Arrow Seniors	LMC	\$6,666.65
2014	11	1057	5791257	Broken Arrow Seniors	LMC	\$3,999.99
2014	11	1057	5805880	Broken Arrow Seniors	LMC	\$1,333.33
2014	12	1058	5765735	Broken Arrow Treetops Apartments Outreach	LMC	\$1,562.49
2014	12	1058	5791257	Broken Arrow Treetops Apartments Outreach	LMC	\$2,083.32
2014	12	1058	5805880	Broken Arrow Treetops Apartments Outreach	LMC	\$520.83
2014	14	1047	5751076	City of Glenpool Senior Center Van	LMC	\$43,915.00
						Matrix Code 05A
						\$64,890.00
2013	13	1016	5727752	Margaret Hudson Counseling	LMC	\$1,710.73
2014	9	1055	5765735	Margaret Hudson Counseling	LMC	\$2,719.32
2014	9	1055	5791257	Margaret Hudson Counseling	LMC	\$2,788.26
						Matrix Code 05D
						\$7,218.31
2013	14	1017	5727752	Child Abuse Network	LMC	\$5,317.29
2014	10	1056	5791257	Child Abuse Network	LMC	\$12,396.03
2014	10	1056	5805880	Child Abuse Network	LMC	\$2,603.97
						Matrix Code 05N
						\$20,317.29
Total						\$109,181.60

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	National Objective	Drawn Amount
2011	17	967	5729458	Sperry Wastewater and Drainage Studies		\$3,813.25
					Matrix Code 20	\$3,813.25
2013	11	1013	5727752	CDBG Administration 2013		\$44,826.87
2013	11	1013	5729458	CDBG Administration 2013		\$27.00
2013	11	1013	5732304	CDBG Administration 2013		\$2,399.39
2014	7	1048	5765757	General Administration		\$48,139.00
2014	7	1048	5770738	General Administration		\$11,966.63
2014	7	1048	5782389	General Administration		\$12,843.77
2014	7	1048	5791257	General Administration		\$12,861.33
2014	7	1048	5805880	General Administration		\$14,655.81
					Matrix Code 21A	\$147,719.80
Total						\$151,533.05