



**Consolidated Annual Performance
and Evaluation Report**
for
Program Year 2020

Tulsa County HOME Consortium

And

Tulsa County Community Development Block
Grant Urban County Program

Prepared by INCOG

September 2021

PROGRAM YEAR 2020

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 2020 Annual Action Plan. The Program Year/Fiscal Year for this report began July 1, 2020 and ended June 30, 2021. 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.

During the 2020 Program Year, through the CARES Act Tulsa County received a special allocation of CDBG-CV1 and CV3 funds in the cumulative amount of \$2,148,327 from the Department of Housing and Urban Development to be used to prevent, prepare for, and respond to the coronavirus (COVID-19) and amended its 2019 Annual Action Plan in May 2020 and May 2021 to include the program. CDBG CV funds were awarded to subrecipients for a variety of Coronavirus-related activities and funds were expended during the program year.

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$399,708.55

During the FY 2020 program year, funds were spent on the following HOME activities:

Homebuyer Assistance (Downpayment & Closing Costs):

Twenty-two (22) 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 \$2,564,169.68 were executed with local lending institutions. This was an average mortgage amount of \$116,553.17, an average mortgage amount approximately \$17,146.99 higher than in the FY2019 program year.

Total Expended in Program Year: \$119,515.34
\$99,408.93 HOME
\$20,106.41 Program Income

Rental Housing

During the FY2018 program year, funds were awarded to a non-profit organization, Nehemiah Community Development, for Cottages on Sixth Street Phase 2 in Bartlesville, Washington County, new construction of six single family rental units for low income at-risk populations, including single female headed households, disabled and veterans. Construction was initiated during the FY2019 program year completed in October 2020.

Total Expended in Program Year: \$222,029.00

HOME Program Administration:

Total Expended in Program Year: \$58,164.21
FY2019: \$58,164.21

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: \$1,699,091.49

	Disbursements	Percentage
Flood Drainage Improvements	\$ 72,828.50	4.29%
Water/Sewer Improvements	\$1,087,691.52	64.02%
Street Improvements	\$ 315,879.49	18.59%
Public Facilities and Improvements	\$1,476,399.51	86.89%
Senior Services	\$ 17,875.50	1.05%
Abused and Neglected Children	\$ 23,124.99	1.36%
Other Public Services	\$ 13,138.50	0.77%
Subtotal for : Public Services	\$ 54,138.99	3.19%
General Program Administration	\$ 168,552.99	9.92%
Total Disbursements	\$1,699,091.49	100.00%

During the program year, funds were spent on the following CDBG activities from FY2014, FY2015, FY2016, FY2017, FY2018, FY2019 and FY2020 programs:

2020 Program Year Major Initiatives and Highlights

<u>Program Yr.</u>	<u>Activity #</u>	<u>Activity Name</u>	<u>Status</u>	<u>Expenditures</u>
2020	1417	Sand Springs North Lincoln Water Line Replacement	Completed	\$127,029.01
2020	1410	Skiatook Waterline Replacement	Completed	\$210,418.25
2020	1398	Sperry Sewer Line Improvements	Completed	\$200,016.51
2019	1371	Sand Springs Lincoln Ave Waterline	Completed	\$39,116.43
2019	1393	Owasso Hale Acres Sewer Line Replacement Phase 4	Completed	\$133,117.11
2019	1395	Collinsville Waterline and Fire Hydrant Replacement	Completed	\$235,261.00
2018	1409	Sapulpa Park and Dewey Avenues Drainage Improvements	Completed	\$72,828.50
2018	1392	Owasso Hale Acres Sewer Line Replacement Phase 3	Completed	\$142,733.21
2018	1362	Broken Arrow E Detroit Street Rehabilitation	Completed	\$315,879.49

Infrastructure **Total Expended: \$1,476,399.51**

Total CDBG-CV Funds Expended During Program Year: \$582,261.0

	Disbursements	Percentage
Operating Costs of Homeless Programs	\$217,640.20	37.38%
Emergency Rental Assistance Payments	\$315,949.13	54.26%
Housing Information and Referral Services	\$ 9,460.63	1.62%
Subtotal for : Public Services	\$543,049.96	93.27%
General Program Administration	\$ 39,211.05	6.73%
Total Disbursements	\$582,261.01	100.00%

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 CDBG Urban County:

Total CDBG Funds Expended During Program Year: \$1,699,091.49

During the program year, funds were spent from FY2014, FY2015, FY2016, FY2017, FY2018, FY2019 and FY2020 programs for activities in the following categories:

Infrastructure: \$1,476,399.51

Social Services: \$54,138.99

General Program Administration: \$168,322.99

Tulsa County CDBG Coronavirus (CV):

Operating Costs of Homeless Programs: \$217,640.20

Emergency Rental Assistance Payments: \$315,949.13

Housing Information and Referral Services: \$ 9,460.63

Subtotal for : Public Services: \$543,049.96

General Program Administration\$ 39,211.05

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$399,708.55

Homebuyer Assistance (Downpayment & closing costs): \$99,408.93

Program Income for HBA: \$20,106.41

Innovative Housing Initiatives (New Construction of SF Rental Housing): \$222,029.00

General Program Administration: \$58,164.21

See uploaded Attachment 1 document 2020 Executive Summary for discussion of major initiatives and highlights of program year.

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	4100	0	0.00%			
Construction of Public Facilities and Services	Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	200000	5874	2.94%	45749	5874	12.84%
Construction of Public Facilities and Services	Non-Housing Community Development	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	0	249		0	249	
Construction of Public Infrastructure	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	27900	2648	9.49%	3282	2648	80.68%

Homeownership Opportunities for Low Income	Affordable Housing	HOME: \$	Homeowner Housing Added	Household Housing Unit	0	11		0	11	
Homeownership Opportunities for Low Income	Affordable Housing	HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	180	0	0.00%	35	0	0.00%
New Construction of Single Family Rental Units	Affordable Housing	HOME: \$	Rental units constructed	Household Housing Unit	15	5	33.33%	0	5	
Rental Housing for Elderly Households	Affordable Housing	HOME: \$	Rental units rehabilitated	Household Housing Unit	80	40	50.00%	40	40	100.00%

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 priority based by community and not Urban County-wide.

Because affordable housing for elderly low income households in the region is a stated priority for the HOME Consortium, program efforts during a program year are generally directed to maintaining quality and energy efficient units for the elderly through the funding of the rehabilitation of elderly congregate housing developed by the HOME Consortium over 20 years ago. Although funds were awarded in February 2021 for Phase 2 energy efficiency improvements to an elderly complex in Coweta, rising construction costs prevented the start of construction. The number of Homebuyer Assistance units completed during the performance year included units funded with FY2017, 2018 and 2020 funds.

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	36,021	132
Black or African American	1,081	9
Asian	715	0
American Indian or American Native	1,986	8
Native Hawaiian or Other Pacific Islander	2	0
Total	39,805	149
Hispanic	738	2
Not Hispanic	39,067	147

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

Narrative

In Program Year FY20, the HOME Consortium provided Homebuyer Assistance to 22 households through Community Action Resource and Development (CARD) and Housing Partners of Tulsa. A total of eighteen (18) of the households were identified as White with two (2) of those households identified as White-Hispanic. Two (2) households were Black and one (1) was reported as Other. One (1) household was identified as American Indian or Native American. Thirteen (13) households had children and six (6) households were identified as single-non elderly. Three (3) households were identified as Other.

The racial and ethnic composition reported in the table above for the HOME and CDBG activities reflect in general the demographic composition of the region. Eighty-seven (87%) of the households assisted were reported as White, with 2% reported as Black/African American, 3% American Indian and 2% Asian. Other racial and ethnic groups combined to total 6%.

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	1,464,744	1,699,091
HOME	public - federal	1,106,031	399,708
Other- CV1	public-federal	2,148,327	582,261

Table 3 - Resources Made Available

Narrative

The Actual Amount Expended is the amount expended on activities during the Performance period, and includes amounts expended from prior years' funding.

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 (6), Broken Arrow (4), Claremore (3), Skiatook (3), Glenpool (2), Sapulpa (2), Sand Springs (1) and Owasso (1). The rehabilitation of 40 units of elderly housing in Coweta was reported as completed in IDIS during the program year, although no HOME funds were expended on this activity during the program year. New construction of rental single family was completed in Bartlesville. CDBG funds were expended in targeted areas determined locally.

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 projects. Beginning October 1, 2018 through September 30, 2020, a Presidential Declaration of a Major Disaster under the Robert T. Stafford Act for damage resulting from severe storms was in effect for HOME expenditures in Osage, Tulsa, and Wagoner Counties. Additionally, through waivers associated with the CARES Act which waived all match requirements for the HOME program, the HOME Consortium's Match Liability was reduced to \$-0-.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	3,150,392
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	3,150,392
4. Match liability for current Federal fiscal year	0
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	3,150,392

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
								0

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 begin-ning 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	20,106	20,106	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	0	0	0	0	0	0
Number	0	0	0	0	0	0
Sub-Contracts						
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0
	Total	Women Business Enterprises	Male			
Contracts						
Dollar Amount	0	0	0			
Number	0	0	0			
Sub-Contracts						
Number	0	0	0			
Dollar Amount	0	0	0			

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	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

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	0
Number of Non-Homeless households to be provided affordable housing units	0	0
Number of Special-Needs households to be provided affordable housing units	20	6
Total	20	6

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	20	6
Number of households supported through Rehab of Existing Units	40	40
Number of households supported through Acquisition of Existing Units	0	22
Total	60	68

Table 12 – Number of Households Supported

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

There were 22 homebuyer locations in the FY20 HOME Program through CARD-Community Action Resource & Development, Inc. and Housing Partners of Tulsa. These units were assisted under FY2017, 2018 and FY2020 HOME funding. The 20 units listed as the one-year goal for the the production of new units reflects the development of single family rental units in Bartlesville. Six of these units were under construction during the program year, and final draw and completion occurred in November 2020. The 40 units listed as the Rehab of Existing Units is the rehabilitation of Carriage Crossing in Coweta. This activity was completed in March 2020.

Discuss how these outcomes will impact future annual action plans.

The HOME Consortium feels that goals developed are on track for the affordable housing market in the region, and no changes are anticipated.

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	249	16
Low-income	5,625	124
Moderate-income	0	9
Total	5,874	149

Table 13 – Number of Households Served

Narrative Information

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

Three different Continuum of Care organizations cover the geographic area of the Tulsa Metropolitan HOME Consortium. Tulsa-Tulsa County-Broken Arrow combine to form an urban Continuum of Care. Creek and Osage Counties are part of the rural North Central Oklahoma CoC. Rogers, Wagoner, and Washington Counties are part of the rural Northeast Oklahoma CoC. In January 2020, the Tulsa City & County Continuum of Care, known as A Way Home for Tulsa, reconstituted and adopted a new Governance Charter. A new Leadership Council, which serves as the board of AWH4T, was formed to oversee the Tulsa-Tulsa County Continuum of Care process. The Leadership Council is comprised of four Appointed Members; five Elected Members who are providers; and six Invited Members from various advocacy groups. A Senior management staff member of the INCOG Community Development department was appointed to the Leadership Council, as well as a Tulsa County Commissioner. In addition, INCOG staff members have previously participated each January in the *One-night Consumer Survey* or PIT-“Point-in-Time” count of the Tulsa area homeless population. The INCOG staff has focused on the City of Broken Arrow during the One-night survey.

The 2021 PIT Survey was held on the night of January 28, 2021. A total of **1,043** individuals, including children, were experiencing homelessness in the Tulsa area. There were no persons counted as homeless in Broken Arrow on that evening. The 2021 PIT Survey was conducted state-wide, despite the challenges of the restrictions imposed by the COVID pandemic. The North Central CoC did not count any unsheltered homeless in Creek or Osage Counties, and there are no shelters in those two counties.

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 or any other CoC. INCOG staff members do participate in the local meetings of the Leadership Council of AWH4T-A Way Home for Tulsa. The emergency shelters that serve the City of Tulsa also serve the suburban areas of Tulsa County. Some of the shelters serve clients from outlying communities in Northeastern Oklahoma. The provider agencies that are members of the AWH4T all provide some level of emergency and transitional housing with the goal of finding permanent housing for all of their clients.

Tulsa County used CDBG CV allocations to fund the Emergency Overflow Shelter opened to create

additional housing for homeless populations so that proper social distancing protocols could be observed. Tulsa Day Center and The Salvation Army were awarded funds to operate the Emergency Shelter.

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. During the FY2019 program year, though, CDBG CV funding was awarded to address homeless populations.

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

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. During the FY2019 program year, though, CDBG CV funding was awarded to address homeless populations. INCOG staff members will continue to be involved with the AWH4T Leadership Council and the urban Tulsa-Tulsa County-Broken Arrow CoC. INCOG staff will maintain contacts with the two adjacent rural Continuum of Care organizations in order to address these issues.

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. 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)

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 HOME 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 lead-based paint hazards. 91.220(k); 91.320(j)

Tulsa County staff provided technical assistance to the Tulsa Health Department in the administration of the HUD Healthy Homes Lead Paint Reduction grant awarded to the THD. No households were remediated during the program year.

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

During the FY2020 reporting period, Community Action Project Tulsa County (CAPTC) and Community Resource Development, Inc. (CARD) offered various programs 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.

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

No gaps in institutional structure were identified in the FY20 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)

Tulsa County participated in the A Way Home 4 Tulsa Leadership Council and the efforts by all involved social service agencies to address the critical issue of COVID-related evictions.

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. 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

Tulsa County has adopted monitoring policies and procedures, which detail frequency and standards for monitoring by staff. CDBG funds are monitored with each draw request, and HOME housing units are monitored every three years. INCOG Staff members conducted three on-site monitoring visits and one desk monitoring of CDBG Urban County cities where CDBG funds were expended during FY 2020. Broken Arrow, the largest city in the Urban County program was monitored for their Detroit Street Rehabilitation project, and Broken Arrow Neighbors was monitored for their two social service projects. The purpose of the monitoring visits was to review original source documentation for the City's payments to contractors on CDBG projects within 30 days of payment. In the HOME Program, an onsite monitoring visit to CARD -Community Action Resource and Development in Claremore was conducted on June 28, 2021 to review the CARD Homebuyer Assistance program.

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 Citizens Participation Plan, a public hearing to review the FY 2020 performance of the HOME Consortium, CDBG Urban County, and CDBG-CV programs was held during the regular Tulsa County Board of Commissioners meeting on Tuesday, September 7, 2021. Notification of the public hearing was published in the regional *Tulsa World* newspaper 7 days prior to the hearing, and posted on the Tulsa County website and the INCOG website. 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 2020 program year on encouraging participating jurisdictions to speedily expend grant funds, despite the challenges imposed on city governments and construction contracts by the COVID pandemic. A review of the PR56 CDBG Timeliness Report on May 1, 2021 showed a 1.49 Draw Ratio for Tulsa County, so Tulsa County met the timeliness test.

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

No

[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.

Per 92.504(d), on-site inspections must occur at least once every 3 years during the period of affordability. In May 2018, INCOG staff conducted on-site physical inspections of all 12 Vintage Housing elderly apartments and did monitoring of client files for income eligibility and rent calculations. Per our schedule, the next inspections were due in May 2021. However, a waiver of on-site inspections was issued by HUD due to the impacts of the Coronavirus, with an expiration date of September 2021. No on-site inspections were conducted during the program year.

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

The Tulsa County 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 of the affordable housing developments 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 2020 Program Year, the HOME Consortium used \$20,106.41 in program income to assist seven households with a portion of their Homebuyer Assistance downpayment and closing costs. All seven households assisted with program income were owner-occupied.

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 HOME Consortium accepted RFPs from non-profit developers during the FY2020 program period to create affordable housing units for special needs populations in partnership with Federal Home Loan Bank Topeka's Affordable Housing Program. However, this application for the AHP grant was not awarded funding by FHLBTopeka, and the HOME Consortium fully funded the activity of the Cottages on Sixth. This project was completed during the FY2020 program period.

Attachment

2020 CAPER Executive Summary



**Consolidated Annual Performance
and Evaluation Report**
for
Program Year 2020

Tulsa County HOME Consortium

And

Tulsa County Community Development Block
Grant Urban County Program

Prepared by INCOG

September 2021

PROGRAM YEAR 2020

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 2020 Annual Action Plan. The Program Year/Fiscal Year for this report began July 1, 2020 and ended June 30, 2021. 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.

During the 2020 Program Year, through the CARES Act Tulsa County received a special allocation of CDBG-CV1 and CV3 funds in the cumulative amount of \$2,148,327 from the Department of Housing and Urban Development to be used to prevent, prepare for, and respond to the coronavirus (COVID-19) and amended its 2019 Annual Action Plan in May 2020 and May 2021 to include the program. CDBG CV funds were awarded to subrecipients for a variety of Coronavirus-related activities and funds were expended during the program year.

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$399,708.55

During the FY 2020 program year, funds were spent on the following HOME activities:

Homebuyer Assistance (Downpayment & Closing Costs):

Twenty-two (22) 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 \$2,564,169.68 were executed with local lending institutions. This was an average mortgage amount of \$116,553.17, an average mortgage amount approximately \$17,146.99 higher than in the FY2019 program year.

Total Expended in Program Year: \$119,515.34
\$99,408.93 HOME
\$20,106.41 Program Income

Rental Housing

During the FY2018 program year, funds were awarded to a non-profit organization, Nehemiah Community Development, for Cottages on Sixth Street Phase 2 in Bartlesville, Washington County, new construction of six single family rental units for low income at-risk populations, including single female headed households, disabled and veterans. Construction was initiated during the FY2019 program year completed in October 2020.

Total Expended in Program Year: \$222,029.00

HOME Program Administration:

Total Expended in Program Year: \$58,164.21
FY2019: \$58,164.21

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: \$1,699,091.49

	Disbursements	Percentage
Flood Drainage Improvements	\$ 72,828.50	4.29%
Water/Sewer Improvements	\$1,087,691.52	64.02%
Street Improvements	\$ 315,879.49	18.59%
Public Facilities and Improvements	\$1,476,399.51	86.89%
Senior Services	\$ 17,875.50	1.05%
Abused and Neglected Children	\$ 23,124.99	1.36%
Other Public Services	\$ 13,138.50	0.77%
Subtotal for : Public Services	\$ 54,138.99	3.19%
General Program Administration	\$ 168,552.99	9.92%
Total Disbursements	\$1,699,091.49	100.00%

During the program year, funds were spent on the following CDBG activities from FY2014, FY2015, FY2016, FY2017, FY2018, FY2019 and FY2020 programs:

2020 Program Year Major Initiatives and Highlights

<u>Program Yr.</u>	<u>Activity #</u>	<u>Activity Name</u>	<u>Status</u>	<u>Expenditures</u>
2020	1417	Sand Springs North Lincoln Water Line Replacement	Completed	\$127,029.01
2020	1410	Skiatook Waterline Replacement	Completed	\$210,418.25
2020	1398	Sperry Sewer Line Improvements	Completed	\$200,016.51
2019	1371	Sand Springs Lincoln Ave Waterline	Completed	\$39,116.43
2019	1393	Owasso Hale Acres Sewer Line Replacement Phase 4	Completed	\$133,117.11
2019	1395	Collinsville Waterline and Fire Hydrant Replacement	Completed	\$235,261.00
2018	1409	Sapulpa Park and Dewey Avenues Drainage Improvements	Completed	\$72,828.50
2018	1392	Owasso Hale Acres Sewer Line Replacement Phase 3	Completed	\$142,733.21
2018	1362	Broken Arrow E Detroit Street Rehabilitation	Completed	\$315,879.49

Infrastructure

Total Expended:

\$1,476,399.51

Total CDBG-CV Funds Expended During Program Year: \$582,261.0

	Disbursements	Percentage
Operating Costs of Homeless Programs	\$217,640.20	37.38%
Emergency Rental Assistance Payments	\$315,949.13	54.26%
Housing Information and Referral Services	\$ 9,460.63	1.62%
Subtotal for : Public Services	\$543,049.96	93.27%
General Program Administration	\$ 39,211.05	6.73%
Total Disbursements	\$582,261.01	100.00%

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.

CAPER Public Hearing Proof of Publication

TULSA WORLD

P.O. Box 1770 Tulsa, Oklahoma 74102-1770 | tulsaworld.com

Account Number

1047708

INCOG
 Attn: CLAUDIA RH-RRP
 1701 W 8 - SECOND STREET, STE 800
 TULSA, OK 74103

Date

August 31, 2021

Date	Category	Description	Ad Size	Total Cost
09/31/2021	Legal Notices	NOTICE OF PUBLIC HEARING	2 x 39.00 CL	49.92

Affidavit of Publication

I, Brenda Brumbaugh, of lawful age, am a legal representative of the Tulsa World of Tulsa, Oklahoma, a daily newspaper of general circulation in Tulsa County, Oklahoma, a legal newspaper qualified to publish legal notices, as defined in 25 O.S. § 106 as amended, and thereafter, and complies with all other requirements of the laws of Oklahoma with reference to legal publication. This said notice, a true copy of which is attached hereto, was published in the regular edition of said newspaper during the period and time of publication and not in a supplement, on the DATE(S) LISTED HEREON:

08/31/2021

Newspaper reference: 0000720572

Brenda Brumbaugh
 Legal Representative

Sworn to and subscribed before me this date: 8-31-21

M. Marshall
 Notary Public

My Commission expires 10-14-24


M. MARSHALL
 NOTARY PUBLIC - STATE OF OKLAHOMA
 MY COMMISSION EXPIRES OCT. 14, 2024
 COMMISSION # 20012750

Filed
 Filed in the Tulsa World, Tulsa County, Oklahoma, on
 August 31, 2021.

NOTICE OF PUBLIC HEARING and NOTICE OF AVAILABILITY OF ANNUAL PERFORMANCE REPORT for the TULSA COUNTY HOME CONSTRUCTION and CD95 URBAN COUNTY PROGRAMS

A Public Hearing will be held for 2:00 p.m. on Tuesday, September 7, 2021 at the Tulsa County Commission Room at 20 West 3rd St., Room 120, Tulsa, Oklahoma. Plans for FY HOME and CD95 funds were seen in class and counties within the program states areas. Fiscal Year 2021 the HOME Construction awarded \$26,385,55; the Urban County expended \$29,091,47 in CD95 funds; and CD95 City funds in the amount of \$26,543,01 were expended from the Department of Housing and Urban Development. The Tulsa County HOME Construction, CD95 Urban County, and the CD95 City programs are required to prepare a Semi-Annual Annual Performance and Evaluation Report (CAPER) for submission to U.S. Department of Housing and Urban Development (HUD) at the completion of the grant program year. The CAPER describes how HOME, CD95, and CV funds that were received during the program year ending June 30, 2021 were spent in the jurisdiction. Beginning September 14, 2021 copies of a draft CAPER will be available for a 30-day public review period. The 2021 CAPER will be available on our website at www.tulsacounty.org and www.tulsaworld.com. The public is invited to review the document and make comments on the County's grant performance. The Plan will be submitted to the U.S. Department of Housing and Urban Development (HUD) by September 30, 2021. For more information, questions or comments go to INCOG - 1409 West 51st, Suite 800, Tulsa, Oklahoma 74103. Anyone requiring special accommodations should call Claudia Rhoads at 766-847825.

PR26 CDBG Financial Summary

	Office of Community Planning and Development	RD#	08-05-21
	U.S. Department of Housing and Urban Development	TRM	16-24
	Integrated Disbursement and Information System	RD#	1
	PR26 - CDBG Financial Summary Report		
	Program Year 2020		
	TULSA COUNTY, OK		

PART I: SUMMARY OF CDBG RESOURCES	
01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	2,058,510.24
02 ENTITLEMENT GRANT	1,464,744.00
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 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	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	3,523,254.24
PART II: SUMMARY OF CDBG EXPENDITURES	
09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	1,530,538.50
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	1,530,538.50
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	168,552.99
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)	1,699,091.49
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,824,162.75
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	1,530,538.50
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	1,530,538.50
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 BENEFITTING 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	54,138.99
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)	54,138.99
32 ENTITLEMENT GRANT	1,464,744.00
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)	1,464,744.00
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	3.70%
PART V: PLANNING AND ADMINISTRATION (PA) CAP	
37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	168,552.99

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)	168,552.99
42 ENTITLEMENT GRANT	1,464,744.00
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)	1,464,744.00
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	11.51%

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

Plan Year	I D	IDIS Activ	Voucher Number	Activity Name	Matrix Code	Natio nal Object	Drawn Amount
2018	6	1409	6467856	City of Sapulpa Park and Dewey Drainage Improvements	03I	LMA	\$72,828.50
					03I	Matrix	\$72,828.50
2018	4	1392	6432704	City of Owasso Hale Acres Sanitary Sewer Line Rehabilitation	03J	LMA	\$142,733.21
2019	3	1395	6438953	City of Collinsville Waterline and Fire Hydrant Replacement	03J	LMA	\$235,261.00
2019	4	1393	6432704	City of Owasso Hale Acres Sewer Line Replacement Phase 4	03J	LMA	\$133,117.11
2019	5	1371	6398707	City of Sand Springs North Lincoln Ave Water Line Replacement	03J	LMA	\$26,281.56
2019	5	1371	6448066	City of Sand Springs North Lincoln Ave Water Line Replacement	03J	LMA	\$12,834.87
2020	4	1417	6481001	City of Sand Springs North Lincoln Water Line Replacement	03J	LMA	\$43,881.54
2020	4	1417	6490752	City of Sand Springs North Lincoln Water Line Replacement	03J	LMA	\$52,156.67
2020	4	1417	6504801	City of Sand Springs North Lincoln Water Line Replacement	03J	LMA	\$30,990.80
2020	6	1410	6472105	City of Skiatook Waterline Replacement	03J	LMA	\$102,366.78
2020	6	1410	6500109	City of Skiatook Waterline Replacement	03J	LMA	\$108,051.47
2020	7	1398	6449549	Town of Sperry Sewer Line Improvements	03J	LMA	\$34,262.27
2020	7	1398	6457829	Town of Sperry Sewer Line Improvements	03J	LMA	\$1,125.00
2020	7	1398	6472105	Town of Sperry Sewer Line Improvements	03J	LMA	\$7,111.24
2020	7	1398	6500109	Town of Sperry Sewer Line Improvements	03J	LMA	\$155,568.00
2020	7	1398	6500112	Town of Sperry Sewer Line Improvements	03J	LMA	\$1,950.00
					03J	Matrix	\$1,087,691.52
2018	2	1362	6460286	Broken Arrow E Detroit Street Rehabilitation	03K	LMA	\$315,879.49
					03K	Matrix	\$315,879.49
2019	9	1351	6460286	Broken Arrow Neighbors Senior Complexes Outreach	05A	LMC	\$708.75
2019	12	1350	6460286	Broken Arrow Seniors	05A	LMC	\$1,739.25
2020	8	1404	6460560	Broken Arrow Neighbors Senior Complexes Outreach	05A	LMC	\$4,440.00
2020	11	1406	6460560	Broken Arrow Seniors	05A	LMC	\$10,987.50
					05A	Matrix	\$17,875.50
2019	11	1349	6460286	Child Abuse Network	05N	LMC	\$3,750.00
2020	10	1405	6460560	Child Abuse Network	05N	LMC	\$19,374.99
					05N	Matrix	\$23,124.99
2019	10	1352	6460286	Broken Arrow Neighbors	05Z	LMC	\$1,808.50
2020	9	1403	6460560	Broken Arrow Neighbors	05Z	LMC	\$11,330.00
					05Z	Matrix	\$13,138.50
Total							\$1,530,538.50

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

Plan Year	I D	IDIS Activ	Voucher Number	Activity to prevent	Activity Name	Grant Number	Fun d	Matrix Code	Natio nal	Drawn Amount
2019	9	1351	6460286	No	Broken Arrow Neighbors Senior Complexes	B19U	EN	05A	LMC	\$708.75
2019	12	1350	6460286	No	Broken Arrow Seniors	B19U	EN	05A	LMC	\$1,739.25

2020	8	1404	6460560	No	Broken Arrow Neighbors Senior Complexes	B20U	EN	05A	LMC	\$4,440.00
2020	11	1406	6460560	No	Broken Arrow Seniors	B20U	EN	05A	LMC	\$10,987.50
									05A Matrix	\$17,875.50
2019	11	1349	6460286	No	Child Abuse Network	B19U	EN	05N	LMC	\$3,750.00
2020	10	1405	6460560	No	Child Abuse Network	B20U	EN	05N	LMC	\$19,374.99
									05N Matrix	\$23,124.99
2019	10	1352	6460286	No	Broken Arrow Neighbors	B19U	EN	05Z	LMC	\$1,808.50
2020	9	1403	6460560	No	Broken Arrow Neighbors	B20U	EN	05Z	LMC	\$11,330.00
									05Z Matrix	\$13,138.50
									No Activity to prevent, prepare for, and resp	\$54,138.99
Total										\$54,138.99

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

Plan Year	Line Item	Voucher Number	Activity Name	Matrix Code	Ratio	Drawn Amount
2018	15	1328	6393609	2018 CDBG Administration	21A	\$18,799.20
2018	15	1328	6399165	2018 CDBG Administration	21A	\$18,799.73
2018	15	1328	6407159	2018 CDBG Administration	21A	\$18,308.97
2018	15	1328	6420288	2018 CDBG Administration	21A	\$4,031.17
2019	13	1386	6420288	2019 CDBG Administration	21A	\$2,908.75
2019	13	1386	6438984	2019 CDBG Administration	21A	\$32,618.80
2019	13	1386	6449639	2019 CDBG Administration	21A	\$11,502.11
2019	13	1386	6457829	2019 CDBG Administration	21A	\$15,431.07
2019	13	1386	6465027	2019 CDBG Administration	21A	\$9,285.70
2019	13	1386	6472322	2019 CDBG Administration	21A	\$10,183.04
2019	13	1386	6485132	2019 CDBG Administration	21A	\$13,947.78
2019	13	1386	6502629	2019 CDBG Administration	21A	\$12,736.67
					21A Matrix	\$168,552.99
Total						\$168,552.99

PR26 CDBG CV Financial Summary

	Office of Community Planning and Development	08-30-21
	U.S. Department of Housing and Urban Development	14:49
	Integrated Disbursement and Information System	1
	PR26 - CDBG-CV Financial Summary Report	
	TULSA COUNTY , OK	

PART I: SUMMARY OF CDBG-CV RESOURCES	
01 CDBG-CV GRANT	2,148,327.00
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)	2,148,327.00
PART II: SUMMARY OF CDBG-CV EXPENDITURES	
05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	779,403.35
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	42,544.62
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	821,947.97
09 UNEXPENDED BALANCE (LINE 04 - LINE8)	1,326,379.03
PART III: LOW/MOD 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	0.00
12 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	779,403.35
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	779,403.35
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	779,403.35
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	100.00%
PART IV: PUBLIC SERVICE (PS) CALCULATIONS	
16 DISBURSED IN IDIS FOR PUBLIC SERVICES	779,403.35
17 CDBG-CV GRANT	2,148,327.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	36.28%
PART V: PLANNING AND ADMINISTRATION (PA) CAP	
19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	42,544.62
20 CDBG-CV GRANT	2,148,327.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	1.98%

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

Plan Year	IDIS Proj ect	IDIS Activity	Voucher Number	Activity Name	Matrix Code	Nati onal Obj	Drawn Amount		
2019	17	1402	6457001	Owasso Community Resources Housing Financial Assistance	05Q	LMC	\$25,000.00		
			6492858	Owasso Community Resources Housing Financial Assistance	05Q	LMC	\$15,000.00		
		1407	6463109	Restore Hope Ministries Emergency Rental Assistance Program	05Q	LMC	\$60,000.00		
			6474703	Restore Hope Ministries Emergency Rental Assistance Program	05Q	LMC	\$25,000.00		
			1416	6479754	Broken Arrow Neighbors Emergency Rental Assistance Program	05Q	LMC	\$19,043.54	
			18	1385	6415946	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$81,926.78
					6418054	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$24,123.93
		1415	6504012	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$4,129.49		
			6520343	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$8,258.98		
			6478627	Salvation Army Emergency Overflow Shelter Operations CDBG CV	03T	LMC	\$107,460.00		
			19	1396	6444078	Public Services HMIS Data Collection	05X	LMC	\$3,943.45
6446584	Public Services HMIS Data Collection	05X			LMC	\$3,754.43			
6492858	Public Services HMIS Data Collection	05X			LMC	\$1,762.75			
21	1419	6504887	Housing Solutions Hotel to Housing Emergency Shelter Operations	05Q	LMC	\$171,905.59			

			6516025	Housing Solutions Hotel to Housing Emergency Shelter Operations	05Q	LMC	\$228,094.41
Total							\$779,403.35

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

Plan Year	IDIS Proj ect	IDIS Activity	Voucher Number	Activity Name	Matrix Code	Nati onal Obj	Drawn Amount
2019	17	1402	6457001	Owasso Community Resources Housing Financial Assistance	05Q	LMC	\$25,000.00
			6492858	Owasso Community Resources Housing Financial Assistance	05Q	LMC	\$15,000.00
		1407	6463109	Restore Hope Ministries Emergency Rental Assistance Program	05Q	LMC	\$60,000.00
			6474703	Restore Hope Ministries Emergency Rental Assistance Program	05Q	LMC	\$25,000.00
		1416	6479754	Broken Arrow Neighbors Emergency Rental Assistance Program	05Q	LMC	\$19,043.54
	18	1385	6415946	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$81,926.78
			6418054	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$24,123.93
			6504012	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$4,129.49
			6520343	Tulsa Day Center Emergency Overflow Shelter Operations CDBG-CV	03T	LMC	\$8,258.98
		1415	6478627	Salvation Army Emergency Overflow Shelter Operations CDBG CV	03T	LMC	\$107,460.00
	19	1396	6444078	Public Services HMIS Data Collection	05X	LMC	\$3,943.45
			6446584	Public Services HMIS Data Collection	05X	LMC	\$3,754.43
			6492858	Public Services HMIS Data Collection	05X	LMC	\$1,762.75
	21	1419	6504887	Housing Solutions Hotel to Housing Emergency Shelter Operations	05Q	LMC	\$171,905.59
			6516025	Housing Solutions Hotel to Housing Emergency Shelter Operations	05Q	LMC	\$228,094.41
Total							\$779,403.35

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

Plan Year	IDIS Proj ect	IDIS Activity	Voucher Number	Activity Name	Matrix Code	Nati onal Obj	Drawn Amount
2019	20	1397	6444064	CV Public Services Administration	21A		\$22,824.05
			6449639	CV Public Services Administration	21A		\$1,188.60
			6457829	CV Public Services Administration	21A		\$1,103.70
			6465027	CV Public Services Administration	21A		\$3,056.36
			6472322	CV Public Services Administration	21A		\$4,177.02
			6485132	CV Public Services Administration	21A		\$3,380.46
			6502629	CV Public Services Administration	21A		\$3,480.86
			6518105	CV Public Services Administration	21A		\$2,478.88
			6527285	CV Public Services Administration	21A		\$854.69
Total							\$42,544.62



TULSA COUNTY

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

Activity Group	Activity Category	Open Count	Open Activities Disbursed	Completed Count	Completed Activities	Program Year Count	Total Activities Disbursed
Public Facilities and Improvements	Flood Drainage Improvements (03I)	0	\$0.00	1	\$72,828.50	1	\$72,828.50
	Water/Sewer Improvements (03J)	0	\$0.00	7	\$1,087,691.52	7	\$1,087,691.52
	Street Improvements (03K)	0	\$0.00	1	\$315,879.49	1	\$315,879.49
	Total Public Facilities and Improvements	0	\$0.00	9	\$1,476,399.51	9	\$1,476,399.51
Public Services	Operating Costs of Homeless/AIDS	1	\$110,180.20	1	\$107,460.00	2	\$217,640.20
	Senior Services (05A)	0	\$0.00	4	\$17,875.50	4	\$17,875.50
	Abused and Neglected Children (05N)	0	\$0.00	2	\$23,124.99	2	\$23,124.99
	Subsistence Payment (05Q)	4	\$315,949.13	0	\$0.00	4	\$315,949.13
	Housing Information and Referral	1	\$9,460.63	0	\$0.00	1	\$9,460.63
	Other Public Services Not Listed in 05A-	0	\$0.00	2	\$13,138.50	2	\$13,138.50
	Total Public Services	6	\$435,589.96	9	\$161,598.99	15	\$597,188.95
General Administration and Planning	General Program Administration (21A)	2	\$147,824.97	1	\$59,939.07	3	\$207,764.04
	Total General Administration and Planning	2	\$147,824.97	1	\$59,939.07	3	\$207,764.04
Grand Total		8	\$583,414.93	19	\$1,697,937.57	27	\$2,281,352.50

CDBG Sum of Actual Accomplishments by Activity Group and Accomplishment Type

Activity Group	Matrix Code	Accomplishment Type	Open Count	Completed Count	Program Year Totals
Public Facilities and Improvements	Flood Drainage Improvements (03I)	Public Facilities	0	2,380	2,380
	Water/Sewer Improvements (03J)	Persons	0	4,543	4,543
	Street Improvements (03K)	Persons	0	765	765
	Total Public Facilities and Improvements		0	7,688	7,688
Public Services	Operating Costs of Homeless/AIDS Patients	Persons	65	58	123
	Senior Services (05A)	Persons	0	40,204	40,204
	Abused and Neglected Children (05N)	Persons	0	221	221
	Subsistence Payment (05Q)	Persons	18	0	18
	Housing Information and Referral Services (05X)	Persons	249	0	249

Other Public Services Not Listed in 05A-05Y, 03T	Persons	0	734	734
Total Public Services		332	41,217	41,549
Grand Total		332	48,905	49,237

CDBG Beneficiaries by Racial / Ethnic Category

Housing-Non Housing	Race	Total Persons	Total Hispanic	
			Persons	Total Households
Non Housing	White	35,791	725	0
		230	7	0
	Black/African American	977	0	0
		103	1	0
	Asian	698	0	0
		1	0	0
	American Indian/Alaskan Native	928	0	0
		36	4	0
	Native Hawaiian/Other Pacific Islander	2	0	0
	American Indian/Alaskan Native & White	1,022	0	0
	Asian & White	16	0	0
	Other multi-racial	1,725	0	0
		20	1	0
Total Non Housing		41,549	738	0
Grand Total	White	35,791	725	0
		230	7	0
	Black/African American	977	0	0
		103	1	0
	Asian	698	0	0
		1	0	0
	American Indian/Alaskan Native	928	0	0
		36	4	0
	Native Hawaiian/Other Pacific Islander	2	0	0
	American Indian/Alaskan Native & White	1,022	0	0
	Asian & White	16	0	0
	Other multi-racial	1,725	0	0
		20	1	0
Total Grand Total		41,549	738	0

CDBG Beneficiaries by Income Category

Income Levels	Owner Occupied	Renter Occupied	Persons
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Non Housing	Extremely Low (<=30%)	0	0	0
		0	0	249
	Low (>30% and <=50%)	0	0	5,625
		0	0	0
	Mod (>50% and <=80%)	0	0	0
		0	0	0
	Total Low-Mod	0	0	5,625
		0	0	249
	Non Low-Mod (>80%)	0	0	0
		0	0	0
Total Beneficiaries	0	0	5,625	
	0	0	249	



Program Year: 2020

Start Date 01-Jul-2020 - End Date 30-Jun-2021

TULSA COUNTY CONSORTIUM
Home Disbursements and Unit Completions

Activity Type	Disbursed Amount	Units Completed	Units Occupied
Rentals	\$3,605,977.20	129	128
First Time Homebuyers	\$112,005.34	21	21
Total, Rentals and TBRA	\$3,605,977.20	129	128
Total, Homebuyers and Homeowners	\$112,005.34	21	21
Grand Total	\$3,717,982.54	150	149

Home Unit Completions by Percent of Area Median Income

Activity Type						Units Completed	
	0% - 30%	31% - 50%	51% - 60%	61% - 80%	Total 0% - 60%	Total 0% - 80%	
Rentals	16	59	52	1	127	128	
First Time Homebuyers	0	8	5	8	13	21	
Total, Rentals and TBRA	16	59	52	1	127	128	
Total, Homebuyers and Homeowners	0	8	5	8	13	21	
Grand Total	16	67	57	9	140	149	

Home Unit Reported As Vacant

Activity Type	Reported as Vacant
Rentals	1
First Time Homebuyers	0
Total, Rentals and TBRA	1
Total, Homebuyers and Homeowners	0
Grand Total	1

Home Unit Completions by Racial / Ethnic Category

	Rentals		First Time Homebuyers	
	Completed	Completed -	Completed	Completed -
White	115	0	17	2
Black/African American	5	0	2	0
American Indian/Alaskan Native	4	0	1	0
American Indian/Alaskan Native & White	3	0	0	0
Black/African American & White	0	0	1	0
Other multi-racial	1	0	0	0
Total	128	0	21	2

	Total, Rentals and TBRA		Homeowners		Grand Total	
	Completed	Completed -	Completed	Completed -	Completed	Completed -
White	115	0	17	2	132	2
Black/African American	5	0	2	0	7	0
American Indian/Alaskan Native	4	0	1	0	5	0
American Indian/Alaskan Native & White	3	0	0	0	3	0
Black/African American & White	0	0	1	0	1	0
Other multi-racial	1	0	0	0	1	0
Total	128	0	21	2	149	2

Other Public Services (Table 10) (OMB Control No. 2506-0117)

0	224	291
332	43,237	44,639
332	44,461	44,930

Grand Total

OMB Determination by Race/Ethnic Category

Housing-Non Housing	Race	Total Persons	Total Households		Total Persons	Total Households
			Persons	Households		
Housing-Non Housing	White	31,791	723	0	0	0
	Black/African American	223	7	0	0	0
	Hispanic/Latino American	577	7	0	0	0
	Asian	103	0	0	0	0
	Native Hawaiian/Other Pacific Islander	628	0	0	0	0
	American Indian/Alaskan Native	928	0	0	0	0
	Other	28	4	0	0	0
	Hispanic/Latino American (Other)	7	0	0	0	0
	Hispanic/Latino American (Other)	2,022	0	0	0	0
	Asian & Native	16	0	0	0	0
	Other (Total)	1,725	0	0	0	0
	Other (Total)	20	1	0	0	0
Total Non Housing		41,419	730	0	0	0
Grand Total	White	31,791	723	0	0	0
	Black/African American	223	7	0	0	0
	Hispanic/Latino American	577	7	0	0	0
	Asian	103	0	0	0	0
	Native Hawaiian/Other Pacific Islander	628	0	0	0	0
	American Indian/Alaskan Native	928	0	0	0	0
	Other	28	4	0	0	0
	Hispanic/Latino American (Other)	7	0	0	0	0
	Hispanic/Latino American (Other)	2,022	0	0	0	0
	Asian & Native	16	0	0	0	0
	Other (Total)	1,725	0	0	0	0
	Other (Total)	20	1	0	0	0
Total Grand Total		43,543	734	0	0	0

OMB Determination by Income Category

Income Levels	Double Occupied	Single Occupied	Persons
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