

## **City of Newport Beach**

# Program Year 2014-2015 Consolidated Annual Performance and Evaluation Report (CAPER)

September 8, 2015

Prepared by:





September 22, 2015

Mr. William Vasquez, Director Community Planning and Development Department U.S. Department of Housing and Urban Development 611 W. Sixth Street, Suite 800 Los Angeles, CA 90017

Re: P.Y. 2014-2015 Consolidated Annual Performance and Evaluation Report (CAPER)

Dear Mr. Vasquez:

On behalf of the City of Newport Beach, I am pleased to submit one original and two copies of the 2014-2015 Consolidated Annual Performance and Evaluation Report (CAPER).

Should you require additional information or clarification regarding this submittal, please contact me at (909) 476-6006 ext. 115.

Sincerely,

Clint Whited CDBG Consultant

C: Develyn Rhodes-Johnson, CPD Representative, U.S. Dept. of HUD James Campbell, Principal Planner, City of Newport Beach Rudy E. Munoz, Program Consultant, LDM Associates, Inc.

#### City of Newport Beach 2014-2015 Consolidated Annual Performance and Evaluation Report

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## **EXECUTIVE SUMMARY**

### Fifth Program Year CAPER

The Consolidated Plan Management Process (CPMP) Fifth Consolidated Annual Performance and Evaluation Report includes narrative responses to CAPER questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations. The Executive Summary narratives are optional.

#### EXECUTIVE SUMMARY

This report is the Fifth Year Consolidated Annual Performance and Evaluation Report (CAPER) which outlines the City of Newport Beach achievements in meeting the goals and objectives outlined in the City's 2010-2014 Consolidated Plan. The strategic plan objectives, goals, and accomplishments for the 2014-2015 program year are summarized in the table below.

2014-2015 Program Year Goals vs. Accomplishments

Activity	Accomplishment Units	2014-2015 Goals	2014-2015 Accomplishments
Housing:			
Section 8 Housing Choice Voucher and	Housing Units	478	516
Rent-Restricted Units			
Fair Housing Activities:	People Served	160	191
Fair Housing & Counseling Services	i eopie Serveu	100	191
Senior Services:	People Served	130	105
Home Delivered Meals Program	i eopie Serveu	130	103
Special Needs/Non-Homeless:	People Served	12	18
Battered and Abused Spousal Program	i eopie Serveu	12	10
Homeless and HIV/AIDS:			
Guided-Assistance Permanent Placement	People Served	10	15
Housing (GAPP)			
Homeless and HIV/AIDS:	People Served	135	190
Transitional Housing Program	r eople Served	133	190
Public Services:	People Served	25	10
Youth Services	i copie Served	25	10
Public Facilities:	Public Facilities	1	1
Section 108 Loan Repayment-Balboa Village	r ubile r acililles	1	I

A detailed breakdown of the five-year accomplishments for the Newport Beach CDBG program is included in the Summary of Annual Objectives in Appendix "A".

#### **Development of the 2014-2015 CAPER**

As required by the United States Department of Housing and Urban Development (HUD), the City of Newport Beach has prepared the CAPER for public review and comment prior to its submittal to HUD. This document contains an assessment of the City's performance relative to the One-Year Action Plan. To the greatest extent feasible, the data collection efforts required by the CAPER reflect information for housing and community development projects that occurred within the City's jurisdiction, even if the City was not the lead agency for a particular program or project.

#### **Citizen Participation**

As a prerequisite to submitting its CAPER, the City's Citizen Participation Plan and the CDBG implementing regulation require that a public hearing is held to provide citizens with an opportunity to express their views concerning the use of CDBG funds. The public hearing was held on September 8, 2015 before the City Council.

In addition, the draft 2014-2015 CAPER was made available to the general public for a period of 15 days in order to provide an opportunity for the public to review the document. In compliance with the City's approved Citizen Participation Plan and CDBG implementing regulation 24 CFR 91.105, a public notice was published to solicit public comments from interested citizens regarding the draft 2014-2015 CAPER. A copy of the published notice is included as Appendix "C".

#### Consultation

The City obtained information from local agencies in the preparation of the 2014-2015 CAPER. These included Community Based Organizations, City departments and the Fair Housing Foundation.

#### City Council Review and Public Hearing

On September 8, 2015, the City Council reviewed the 2014-2015 CAPER, allowed citizens an opportunity to comment on the draft CAPER and approved the 2014-2015 CAPER.

#### **Activities Undertaken**

The following page indicates the source of funds used to implement projects undertaken with CDBG funds during the 2014-2015 program year.

#### 2014-2015 Program Year Sources of Funds

Source	Amount
2014-2015 CDBG Entitlement	\$366,830
Unallocated CDBG Funds (Prior Year)	\$55,231
CDBG Program Income	\$0
All other forms of CDBG	\$0
TOTAL	\$422,061

#### 2014-2015 Program Year Uses of Funds

Public Services	
Age Well Senior Services – Home Delivered Meals Program	\$ 16,000
Families Forward – Transitional Housing Program	\$ 10,000
Human Options – Community Resource Center	\$ 6,500
Serving People in Need – GAPP Housing Program	\$ 14,000
Youth Employment Service of the Harbor Area – Youth Employment Services	\$ 5,000
Friends of OASIS – Senior Transportation Services	\$ 3,500
Capital Improvements	
City of Newport Beach – 108 Loan Repayment	\$ 205,315
Program Administration	
City of Newport Beach – Program Administration	\$ 61,366
Fair Housing Services	\$ 12,000
TOTAL	\$ 333,681



## I. GENERAL NARRATIVE

#### I. GENERAL NARRATIVE

#### **General Questions**

- 1. Assessment of the one-year goals and objectives:
  - a. Describe the accomplishments in attaining the goals and objectives for the reporting period.
  - b. Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.
  - c. If applicable, explain why progress was not made towards meeting the goals and objectives.

The City consulted with several local agencies concerning their accomplishments for the program year, including Community Based Organizations and the Fair Housing Foundation. Overall, the City has been successful in implementing planned projects during the 2014-2015 program year to meet the majority of the Five-Year Consolidated Plan goals (See Executive Summary 2014-2015 Program Year Goals vs. Accomplishments Table and Appendix "A" Summary of Annual Objectives).

The City uses its CDBG funds to address the Strategic Plan goals for affordable housing, special needs populations, homelessness objectives, community development objectives, and some of the housing objectives such as monitoring and fair housing services. The specific accomplishments for the 2014-2015 program year concerning housing goals and objectives are discussed in Section VII, Housing. The City successfully utilized its allocation of CDBG funds to meet or exceed the majority of the annual goals established for the 2014-2015 program year as illustrated in the table below:

2014-2015 Program Year Goals vs. Accomplishments

Activity	Units	Goals	Accomplishments
Housing: Section 8 Housing Choice Voucher and Rent-Restricted Units	Housing Units	478	516
Fair Housing Activities: Fair Housing & Counseling Services	People Served	160	191
Senior Services: Home Delivered Meals Program	People Served	130	105
Special Needs/Non-Homeless: Battered and Abused Spousal Program	People Served	12	18
Homeless and HIV/AIDS: Guided-Assistance Permanent Placement Housing (GAPP)	People Served	10	15
Homeless and HIV/AIDS: Transitional Housing Program	People Served	135	190
Public Services: Youth Services	People Served	25	10
Public Facilities: Section 108 Loan Repayment-Balboa Village	Public Facilities	1	1

The following table reflects the percentage of CDBG funds expended during the program year to meet HUD-specified objectives.

	HUD Outcomes				
HUD Objectives	Availability / Accessibility	Affordability	Sustainability		
Provide Decent Affordable Housing	3%	-	-		
Create Suitable Living Environments	39%	-	58%		
Create Economic Opportunities	-	-	-		

The table below illustrates how the City used the 2014-2015 CDBG allocation to meet the HUD-specified priority need categories:

HUD Priority Need Categories	2014-2015 Funding	2014-2015 Percentage
Housing & Fair Housing Services	\$ 12,000	3.27%
Senior Services	\$ 19,500	5.33%
Special Needs/Non- Homeless	\$ 6,500	1.77%
Homeless and HIV/AIDS	\$ 24,000	6.54%
Public Services	\$ 5,000	1.36%
*Public Facilities/Infrastructure	\$ 205,315	56.00%
Administration	\$ 61,366	16.73%

<sup>\*</sup>Excludes unallocated funds totaling \$55,231.43 from prior fiscal year and excludes 9% of the annual allocation for future capital improvement project \$33,149.

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

The City would not change its CDBG program at this time. This is a worthy program that increases accessibility for the purpose of creating a suitable living environment and access to decent housing for the residents of Newport Beach.

- 3. Affirmatively Furthering Fair Housing:
  - a. Provide a summary of impediments to fair housing choice.
  - b. Identify actions taken to overcome effects of impediments identified.

Fair housing is a condition in which individuals of similar income levels in the same housing market have like ranges of choice available to them regardless of race, color, ancestry, national origin, religion, sex, disability, marital status, familial status, or any other arbitrary factor.

Equal access to housing for all is fundamental to each person in meeting essential needs and pursuing personal, educational, employment, or other goals. Recognizing this, the Federal government and the State of California have each established fair housing as a right protected by law.

An impediment to fair housing choice, according to HUD, is:

- 1) Any actions, omissions, or decisions taken because of race, color, religion, sex, disability, familial status, or national origin which restrict housing choices or the availability of housing choices; and
- 2) Any actions, omissions or decisions which have the effect of restricting housing choices or the availability of housing choices because of race, color, religion, sex, disability, familial status, or national origin.

To identify impediments to fair housing choice, the City of Newport Beach participated in the Orange County Regional Analysis of Impediments (AI) that was adopted in 2011. The AI provides an overview of laws, regulations, conditions or other possible obstacles that may affect an individual or household's access to housing.

Currently, a new Multi-Jurisdictional AI is being prepared to include information for 16 Orange County jurisdictions including Newport Beach. City staff is managing this effort.

The 2011 AI identified two (2) types of impediments, including public sector impediments and private sector impediments. Based on an evaluation of City Zoning and Planning Codes as well as policies and practices that may pose an impediment to Fair Housing Choice, the authors of the 2011 AI and the City of Newport Beach did not identify any public sector impediments. Therefore, there are no actions to be taken at this time by the City with respect to public sector impediments. The AI did include several private sector impediments observed on a regional basis at the time the 2011 AI was written, including:

- Housing Discrimination Regionally, there were approximately 60 complaints filed annually by residents alleging discriminatory practices in rental and ownership housing. Discrimination is based on a particular bias or biases; however, the leading bias identified in the AI for the period studied was physical or mental disability (35% of all complaints).
- Discriminatory Advertising This can be an impediment to fair housing choice because ads can have the effect of discouraging a certain type of renter or buyer. Ads indicating a preference for a certain type of tenant or buyer such as "no pets" "no children" "No Section 8" or "Ideal for Single Adult" have the effect of housing discrimination.
- Blockbusting The Regional AI lists this item as "being unlawful" but also states that it "does not appear to be a significant impediment to fair housing choice." Blockbusting is defined by Section 804(e) of the 1968 Fair Housing Act, as "For profit, to induce or attempt to induce any person to sell or rent any dwelling by representations regarding the entry or prospective entry into the neighborhood or a person or persons of a particular race, color, religion, sex, handicap, familial status, or national origin.

- Denial of Reasonable Modifications/Reasonable Accommodations It is unlawful to refuse to make reasonable accommodations for disabled persons. Section 804 (3) of the 1968 Fair Housing Act states that discrimination includes:
  - (A) a refusal to permit, at the expense of the handicapped person, reasonable modifications of existing premises occupied or to be occupied by such person if such modifications may be necessary to afford such person full enjoyment of the premises, except that, in the case of a rental, the landlord may where it is reasonable to do so condition permission for a modification on the renter agreeing to restore the interior of the premises to the condition that existed before the modification, reasonable wear and tear excepted.
  - (B) a refusal to make reasonable accommodations in rules, policies, practices, or services, when such accommodations may be necessary to afford such person equal opportunity to use and enjoy a dwelling.
- Hate Crimes Hate crimes committed at a residence are an impediment to fair housing choice because they impact the lives of 20-30 households per year. Almost one-half of all hate crime events in Orange County had an anti-Black or anti-Latino bias motivation. According to FBI data included in the 2011 AI at the time of its writing, the City of Newport Beach experienced approximately five (5) hate crimes per year, not all of which were committed at a residence.
- Unfair Lending Disparities in the loan denial rates experienced by Hispanic and Black/African applicants throughout the region create an impediment to fair housing choice as they have loans denied at rates 1.5 to 2.0 times greater than White applicants throughout the region. The Regional AI did not provide Home Mortgage Disclosure Act (HMDA) data specific to the City of Newport Beach.

To address each of the private sector impediments identified in the 2011 AI, the City of Newport Beach contracts with the Fair Housing Foundation (FHF), a nonprofit organization dedicated to affirmatively furthering fair housing choice through the provision of education and direct client services.

To promote awareness of fair housing laws, FHF implements targeted outreach and education programs for housing consumers including homeowners, prospective homebuyers and tenants as well as housing providers such as sellers, owners, real estate professionals, brokers, landlords and property management firms.

Using available data to analyze current discrimination trends, FHF disseminates brochures that promote awareness of specific fair housing issues in an effort to ensure that all persons have the opportunity to secure safe and decent housing that they desire and can afford, without regard to their race, color, religion, gender, sexual orientation, national origin, familial status, marital status, disability, ancestry,

age, source of income or other characteristics protected by laws. Direct client services range from providing advice concerning general housing issues to performing investigations and advising residents of their rights and remedies under the law in cases where evidence sustains the allegations of discrimination.

FHF's education programs include informational booths at community events, overview presentations to community based organizations, resident associations and government agencies and more detailed workshops tailored to specific audiences such as housing consumers or housing providers. Information booths allow FHF staff to distribute brochures and answer questions from interested residents. Presentations to community based organizations, residents and government agencies involve a 20-40 minute synopsis of FHF's services and a question and answer session.

For housing consumers, FHF offers a detailed two-hour training geared toward tenants that explains fair housing laws, leases, notices, tenant obligations, landlord obligations and specific concerns regarding discrimination topics including renting to families with children, occupancy standards and discriminatory rules.

For housing providers, FHF offers three different education programs including landlord workshops, certificate management training and training for real estate professionals. Landlord workshops are focused on promoting awareness of federal and state fair housing laws and best management practices for property owners and managers seeking to operate their rental properties in a manner consistent with the law. Topics of discussion include the rental process, tenant selection criteria, rental agreements, tenant obligations and landlord obligations in matters such as late fees, security deposits, rent increases and termination of tenancy.

Certificate management training is a more intensive four hour session for property owners, managers, management companies and real estate professionals seeking an in-depth understanding of fair housing laws and practical advice on how to handle common scenarios involving areas of the law that are often unknown or misunderstood such as reasonable accommodation for people with disabilities, sexual harassment, arbitrary discrimination, occupancy standards, reasonable regulations of facilities, advertising guidelines, prohibited practices and hate crimes.

Real estate agent training workshops focus on fair housing laws as they pertain to equal treatment of prospective purchasers in their search for a new home. This workshop provides a summary of the fair housing laws, general guidelines, policies and practices, equal treatment needs, advertising requirements and guidelines for showing properties.

During the 2014-2015 program year, FHF provided the following education program activities at Newport Beach facilities including City Hall, the OASIS Senior Center and the Newport Coast Community Center:

- Certificate Management Trainings (November and April)
- Walk In Clinics throughout the year

- Tenant Rights Workshops throughout the year
- Landlord Rights Workshops throughout the year
- Booths at community events such as National Night Out
- Distribution of 4,169 pieces of literature to facilities and at events in Newport Beach

General housing services involve the provision of advice to landlords, property owners and tenants requesting advice on their rights and responsibilities under federal and state law. Most of the general housing services provided by FHF for Newport Beach residents are by phone to FHF's toll-free hotline at (800) 446-3247. Residents may visit FHF's Orange County office at 600 W. Santa Ana Boulevard, Suite 214A, Santa Ana, CA 92701 to speak with a trained staff member with expertise in the resolution of many common landlord-tenant disputes.

During the 2014-2015 program year, there were 19 fair housing discrimination inquiries to FHF from Newport Beach residents on the basis of familial status, gender, mental disability, national origin, physical disability, and race. Of the 19 fair housing discrimination complaints received, two (2) cases were opened, one (1) complaint was mediated successfully and 16 complaints were resolved successfully. Additionally, FHF provided general housing services to 191 Newport Beach residents, landlords, property owners, real estate professionals and property seekers.

4. Describe Other Actions in Strategic Plan or Action Plan taken to address obstacles to meeting underserved needs.

According to the Consolidated Plan, one of the most underserved needs in the City is affordable housing for families of extremely low, very low and low income. The City has identified the lack of developable sites, high land costs and limited funding as obstacles to affordable housing. Other obstacles in non-housing community development include NIMBY-ism (Not in My Backyard), lack of organizational capacity, and lack of available funding.

The City has previously adopted policies to overcome these obstacles and to encourage affordable housing production by providing density bonuses and fee waivers. The City works closely with affordable housing developers to expedite the permitting process in order to cut costs.

In regard to non-housing obstacles, the City will facilitate community involvement to increase understanding of community needs and the possible solutions to meet those needs. The City will maintain close partnerships with service providers and other community development professionals to identify and correct issues such as lack of capacity and resources.

During the 2014-2015 program year the City added six (6) affordable housing units to its list of monitored affordable units through a housing unit development with an affordability covenant. The City continues to monitor and enforce affordability

covenants on affordable housing projects throughout the City. This includes not only housing units developed with federal funds, but also all units with an affordability covenant in place.

#### 5. Leveraging Resources

- a. Identify progress in obtaining "other" public and private resources to address needs.
- b. How Federal resources from HUD leveraged other public and private resources.
- c. How matching requirements were satisfied.

The City used its CDBG allocation as collateral to secure a \$2.4 million Section 108 loan in the 2001-2002 program year. These funds were used to complete a portion of the Balboa Village Improvement Project. In May, 2015, the City refinanced the Section 108 loan to save approximately \$210,283 of interest payments over the remaining eight (8) year life of the loan. CDBG funds are used to repay the Section 108 loan.

The Orange County Partnership's Continuum of Care Homeless Assistance Grant application resulted in an award of \$19.5 Million for 50 ongoing programs. In addition, the County of Orange also received \$4,246,809 million of Community Development Block Grant (CDBG), HOME Investment Partnership (HOME), and Emergency Shelter Grant (ESG) funds during the program year 2014-2015.

There are no matching requirements for CDBG.

#### MANAGING THE PROCESS

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

The City has made all efforts to ensure compliance with the 2010-2014 Consolidated Plan and the 2014-2015 Action Plan. The City has used data from the HUD Integrated Disbursement and Information System (IDIS) for preparation of the Consolidated Plan and Action Plans. The City has included all necessary HUD reports as part of its CAPER submittal and has utilized the CPMP Tool to monitor the progress of the Strategic Plan (also see Appendix "A"). In addition, the City continues to consult with HUD for technical assistance concerning regulatory matters as necessary.

2014-2015 Program Year Goals vs. Accomplishments

Activity	Accomplishment Units	2014-2015 Goals	2014-2015 Accomplishments
Housing:			
Section 8 Housing Choice Voucher and	Housing Units	478	516
Rent-Restricted Units			
Fair Housing Activities:	People Served	160	191
Fair Housing & Counseling Services	reopie Served	100	191
Senior Services:	Poople Served	130	105
Home Delivered Meals Program	People Served	130	105
Special Needs/Non-Homeless:	Doonlo Convod	12	18
Battered and Abused Spousal Program	People Served	12	10
Homeless and HIV/AIDS:			
Guided-Assistance Permanent Placement	People Served	10	15
Housing (GAPP)			
Homeless and HIV/AIDS:	Doonlo Comind	135	190
Transitional Housing Program	People Served	133	190
Public Services:	Doonlo Comind	25	10
Youth Services	People Served	25	10
Public Facilities:	Public Facilities	1	1
Section 108 Loan Repayment-Balboa Village	Fublic Facilities	ı	I

#### CITIZEN PARTICIPATION

1. Provide a summary of citizen comments.

The City encourages input and feedback on its performance in meeting the objectives of the Strategic Plan from concerned residents and local advocacy groups. The City provides a public review and comment period for the draft version of the CAPER, and also holds a public hearing to solicit input.

A draft copy of the CAPER covering PY 2014-2015 was made available from August 24, 2015 to September 8, 2015. No public comments were received. The public hearing to solicit public input and comment on the CAPER and the City's performance during PY 2014-2015 was held at the Newport Beach City Council Chambers at 100 Civic Center Drive, Newport Beach, California. Notice of both the public comment/review period and the public hearing was published on August 20, 2015 in the Daily Pilot, a newspaper of local circulation. A copy of the Notice appears in Appendix "C".

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

2014-2015 Program Year Sources of Funds

Source	Amount
2014-2015 CDBG Entitlement	\$366,830
Unallocated CDBG Funds (Prior Year)	\$55,231
CDBG Program Income	\$0
All other forms of CDBG	\$0
TOTAL	\$422,061

#### 2014-2015 Program Year Fund Sources and Uses

Activities	Budget	Ex	penditures
Program Administration			
City of Newport Beach – Program Administration	\$ 61,366	\$	61,366
Fair Housing Services	\$ 12,000	\$	12,000
Subtotal Administration:	\$ 73,366	\$	73,366
Public Services			
Age Well Senior Services – Home Delivered Meals Program	\$ 16,000	\$	16,000
Families Forward – Transitional Housing Program	\$ 10,000	\$	10,000
Human Options – Community Resource Center	\$ 6,500	\$	5,244
Serving People in Need – GAPP Housing Program	\$ 14,000	\$	14,000
Youth Employment Service of the Harbor Area – Youth Employment	\$ 5,000	\$	2,665
Friends of OASIS – Senior Transportation Services	\$ 3,500	\$	O <b>1</b>
Subtotal Public Services:	\$ 55,000	\$	47,909
Capital Improvements			
City of Newport Beach – 108 Loan Repayment	\$ 205,315	\$	205,315
Funds for Future Capital Improvements	\$ 88,380 <sup>2</sup>		
Subtotal Capital Improvements:	\$ 293,695	\$	205,315
TOTALS	\$ 422,061	\$	326,590

<sup>&</sup>lt;sup>1</sup> Activity was canceled at the beginning of the program year at the request of the applicant.

#### **Summary of Uses**

Activities	Budget		% of Budget		Expenditures	
Program Administration	\$	73,366	20%	\$	73,366	
Public Services	\$	55,000	15%	\$	47,909	
Capital Improvements	\$	205,315	56%	\$	205,315	
TOTALS	\$	333,681	91%		\$ 326,590	

<sup>&</sup>lt;sup>2</sup> \$88,380 remained unallocated for the purpose of accumulating sufficient funds for an impactful Capital Improvement Project during the 2015-2016 Program Year.

#### INSTITUTIONAL STRUCTURE

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

The City of Newport Beach continued to work with Orange County, the Orange County Housing Authority and various non-profit organizations to provide services to the City's residents. Through the cooperative efforts of these organizations, a variety of housing and community development programs were implemented throughout the community.

The City maintained close contact with social service organizations using CDBG funds as well as other local service providers to coordinate efforts and to avoid the duplication of services.

#### **MONITORING**

1. Describe how and the frequency with which you monitored your activities.

Each program year, the City develops a custom monitoring schedule including each contractor / subrecipient. The monitoring plan includes the following tools:

- Subrecipient Workshop / Onsite Technical Assistance Visit
- Desk monitoring
- Performance reports
- Onsite program and financial reviews

An appropriate combination of these four monitoring methods provides the City with a clear and timely picture of each contractor/subrecipient's progress and level of compliance with program regulations.

#### **Annual Subrecipient Workshop / Onsite Technical Assistance Visits**

An annual workshop is provided for all subrecipients. At this workshop, program staff reviews the program reporting requirements and documentation/recordkeeping standards to foster compliance. For high risk agencies, an onsite technical assistance meeting may also be necessary to assess the subrecipient's capacity related to recordkeeping, service delivery, and/or accounting systems.

#### **Desk Monitoring**

Annually, the City reviews copies of case files to ensure complete and accurate documentation regarding the following items:

- Client eligibility (if applicable)
- Property eligibility (if applicable)
- Appropriate funding levels for the activity
- Compliance with all program requirements (i.e. environmental review)

#### **Performance Reports**

The City requires that performance reports from all subrecipients be submitted in order to facilitate the examination of a project's progress throughout the program year. The performance reports alert program staff to any problems in subrecipient performance, need for technical assistance, and ensure data collection requirements are met.

#### **Annual Onsite Program and Financial Reviews**

The Department provides annual on-site reviews of all high-risk subrecipients in order to conduct a complete programmatic and financial monitoring. The Department will conduct on-site monitoring of low- and moderate-risk subrecipients on a biannual basis.

2. Describe the results of your monitoring including any improvements.

The Department achieved monitoring success through:

- Pre-award eligibility reviews, risk assessment, and orientation;
- Strong written agreements;
- Performance standards and program objectives; and
- Defined monitoring of each subrecipient partner on quarterly, semi-annual, and annual basis.

The City will continually refine its monitoring procedures to ensure that each monitoring has a meaningfully positive impact on the overall program and that projects have measurable outcomes.

#### 3. Self Evaluation

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

Overall, the City has been successful in implementing the proposed projects during the twentieth year of its CDBG program and fifth under the 2010-2014 Five-Year Consolidated Plan.

To facilitate the administration of the CDBG program, the City retains a consultant to provide technical support and to oversee the City of Newport Beach CDBG activities and expenditures. The consultant also monitors existing affordable housing covenants to ensure compliance.

CDBG grants were awarded to six (6) social service and one (1) fair housing agency to address the needs of low- and moderate-income Newport Beach residents.

The City utilizes its CDBG funds to address homeless issues, special needs and community development objectives. Housing objectives are primarily met with the use of local in-lieu fee proceeds. As a result, the majority of the achievements in this report address the strategic plan objectives in which CDBG funds are utilized (homeless, special needs and community development objectives).

The City has met or exceeded the majority of the annual goals for the aforementioned objectives. The City met the following objectives for the program year:

2014-2015 Program Year Goals vs. Accomplishments	2014-2015 Pro	ogram Year	Goals vs.	Accom	plishments
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Activity	Accomplishment Units	2014-2015 Goals	2014-2015 Accomplishments	
Housing:				
Section 8 Housing Choice Voucher and	Housing Units	478	516	
Rent-Restricted Units				
Fair Housing Activities:	People Served	160	191	
Fair Housing & Counseling Services	reopie Serveu	100	191	
Senior Services:	People Served	130	105	
Home Delivered Meals Program	People Served		105	
Special Needs/Non-Homeless:	People Served	12	18	
Battered and Abused Spousal Program	reopie Serveu			
Homeless and HIV/AIDS:		10		
Guided-Assistance Permanent Placement	People Served		15	
Housing (GAPP)				
Homeless and HIV/AIDS:	Doople Conved	135	190	
Transitional Housing Program	People Served	133	190	
Public Services:	People Served	25	10	
Youth Services	reopie served	20	10	
Public Facilities:	Public Facilities	1	1	
Section 108 Loan Repayment-Balboa Village	Fublic Facilities	l	l	

The tables in the Executive Summary and Managing the Process clearly demonstrate that the City met a majority of the quantifiable goals it proposed in the Five-Year Consolidated Plan and the One-Year Action Plan, and exceeded most goals. However, many of the City's programs have indirect benefits that are difficult to measure. For example, the full benefits of the Balboa Village Public Facility Improvements were not realized until private businesses capitalize on the public investment, expand their operations and hire new staff.

In establishing five-year priorities, the City of Newport Beach has taken two (2) concerns into consideration: 1) those categories of lower- and moderate-income households most in need of housing and community development assistance; and 2) which activities will best meet the needs of those identified households. The homeless, persons with special needs and those at risk of homelessness are most in need of housing and community assistance. The City developed the following strategies to address the needs of such persons:

- Provide supportive services and housing for the homeless and near homeless through support of social agencies and regional programs;
- Provide supportive services for special needs populations;
- Provide for the access needs of the physically challenged; and
- Provide needed community services to those of low- and moderate-income.

The activities funded in program year 2014-2015 not only addressed the above strategies, but improved the quality of life for those identified as the most in need of housing and community development assistance.

The City awarded CDBG funds to the Fair Housing Foundation to assist residents, landlords and real estate professionals in their efforts to comply with the requirements of the Fair Housing Act. The Fair Housing Foundation assisted 191 persons with various fair housing services.

The most noteworthy example of how activities and strategies made an impact on identified needs during the 2014-2015 program year is the Age Well Senior Services Mobile Meals Program. This organization provides home-delivered nutritious meals to homebound, disabled, low and moderate-income seniors and disabled persons in southern Orange County, including Newport Beach. Age Well Senior Services delivered nutritional meals to 105 seniors and disabled persons in the City during the program year. In an effort to increase supportive services to elderly residents and disabled persons, Age Well Senior Services has worked with HOAG Hospital to ensure that discharged low-income seniors and disabled persons can receive home delivered nutritionally appropriate meals. Such coordination has improved the access of seniors and disabled persons to services.

Serving People In Need (GAPP Housing Program) assisted 15 low- and/or homeless families and individuals in need of assistance for various housing issues including move-in assistance, rent to prevent eviction and rapid re-housing.

Families Forward provided transitional housing to 190 people including case management and access to a food pantry.

Human Options provided services to 18 clients who are homeless because of domestic violence. This agency provides to battered women with children shelter, food, clothing, and counseling and legal advocacy.

Friends of OASIS declined the grant agreement at the beginning of the program year citing program efficiency concerns in consideration of the size of the proposed grant relative to the CDBG documentation and reporting standards.

The City has not identified barriers to strategies and activities at this time. As previously stated, the City is on target to meet its Strategic Plan goals. The City has no other adjustments to strategies and activities for the CDBG program other than those previously mentioned in this report.

#### **LEAD-BASED PAINT**

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

The City does not administer a general housing rehabilitation program that includes lead abatement and therefore has no method of directly reducing the threat of lead paint in the community. The City provides an informational pamphlet to all property owners and contractors that obtain building permits for construction advising them of the dangers of lead-based paint. The pamphlet includes instructions where to obtain specific information on the topic and how to obtain permits for proper abatement. The City supports the efforts of the Orange County Department of Health Services, an organization that educates residents on the health hazards of lead-based paint through the dissemination of brochures to residents.



# II. Housing

#### II. HOUSING

#### **Housing Needs**

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

The City fosters and maintains affordable housing with local resources such as the Affordable Housing Fund generated from previously collected in-lieu fees required under the City's former inclusionary housing ordinance (since repealed), as well as providing density bonuses, waiver of processing and permitting fees, and the relaxation of development standards. The City continues to monitor its existing portfolio of affordable housing units and enforce existing affordability covenants. The table below provides a list of units that currently have affordability covenants. The City is responsible for monitoring 377 of the 405 affordable units.

**City of Newport Beach - Affordable Housing Units** 

Project Name	Project Address	Termination Date	No. Units	Unit Breakdown
Newport Sea Crest Apts.	843 15 <sup>th</sup> Street	11/1/2016	65	45-2 Bedroom 20-1 Bedroom
Newport Seaside Apts.	1544 Placentia Avenue	8/1/2019	25	23-2 bedroom 2-3 bedroom
Newport Seashore Apts.	849 West 15 <sup>th</sup> Street	7/1/2018	15	2 bedrooms
Newport Harbor I	1538 Placentia Avenue	5/7/2020	26	21-2 bedroom 5-3 bedroom
Pacific Heights Apartments	881-887 W. 15 <sup>th</sup> Street	9/12/2018	7	2 bedrooms
Newport Harbor II	1530 Placentia Ave	7/16/2023	14	10-2 Bedroom 4-SRO Style
Kirkwood (Villa del Este)	401 Seaward Road (Proprietorship)	4/19/2025	2	2 bedrooms
Villa Sienna Condominiums	2102 East 15 <sup>th</sup> Street (Proprietorship)	07/02/2022	3	2 bedrooms
851 Domingo Drive Apts.	851 Domingo Drive (County Project)	Perm.	28	Not monitored by City
Seaview Lutheran Plaza	2900 Pacific View Dr.(Federal Project)	03/26/2021	100	1 bedroom
Lower Bayview Housing	1121 Back Bay Drive	Perm.	120	96-1bedroom 24-2 bedroom
East Bay Apartments	305 East Bay Avenue	02/05/2045	6	2-SRO Style 2-1 bedroom 2-2 bedroom
		TOTAL	420	
TOTAL RENTAL UNITS MONITORED BY THE CITY:			383	

#### Specific Housing Objectives

1. Evaluate progress in meeting specific objective of providing affordable housing, including the number of extremely low-income, low-income, and moderate-income renter and owner households comparing actual accomplishments with proposed goals during the reporting period.

The City divided its efforts to foster and maintain affordable housing into two specific objectives that are described more fully below. The two (2) objectives are:

- Maintain current level of Section 8 Vouchers
- Ensure universal access to fair housing

#### Maintain current level of Section 8 Vouchers

The Orange County Housing Authority (OCHA) administers the Section 8 rental certificate and rental voucher program for the City. The Section 8 rental program provides rental assistance to very low-income families. Currently, 133 households received Section 8 rental assistance.

#### Ensure universal access to fair housing

The Fair Housing Foundation was allocated \$12,000 to provide landlord tenant mediation, eviction prevention and fair housing counseling. Fair Housing Foundation made contacts with individuals in Newport Beach regarding fair housing issues, 191 persons received services. A comprehensive education and outreach program was implemented to ensure that residents, potential residents, landlords, real estate brokers and agents all have access to critical information needed to ensure fair housing choice throughout Newport Beach.

#### HOUSING

5-Year Strategy: Preserve and improve the existing housing stock and ensure equal access				
Outcome/Objective Statements	Planned Activities	Performance Indicator	2014 Goals	2014 Achievements
	Section 8 Housing Choice Voucher and Rent-Restricted Units	Housing Units	478	516
Accessibility / Decent Affordable Housing	Housing Rehabilitation Programs Utility Connection Programs	Housing Units	0	0
	Fair Housing Program	People	160	191

2. Evaluate progress in providing affordable housing that meets the Section 215 definition of affordable housing for rental and owner households comparing actual accomplishments with proposed goals during the reporting period.

The City's goal is to preserve and increase housing affordability. In 2010, the City expected to add at least 102 affordable housing covenants during the current Consolidated Plan period. A Substantial Amendment to the Consolidated Plan was approved on April 22, 2014 to revise housing goal 2 from the Consolidated Plan to reflect zero (0) units. For additional information refer to Appendix "F".

3. Describe efforts to address "worst-case" housing needs and housing needs of persons with disabilities.

In addition to the activities mentioned in questions number 1 and 2 of the Specific Housing Objectives Section above, the City addressed the needs of "worst-case" households through the funding of non-profit public service agencies. "Worst-case" households are defined as households that do not receive on-going rental assistance and pay more than one-half of their income for rent or live in severely inadequate housing. These households face the greatest risk of becoming homeless.

#### **Public Housing Strategy**

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

The City supported the Orange County Housing Authority (OCHA) made efforts to maximize the use of Section 8 funds and other resources within Newport Beach. There are currently thirty-four (34) OCHA participating jurisdictions, including Newport Beach. Representatives from the participating jurisdictions meet at a minimum quarterly, often times monthly, to form the Cities Advisory Committee to assist the Orange County Board of Supervisors and the OCHA staff in accomplishing public housing goals. Newport Beach attends the meetings regularly and provides input on the OCHA Five-Year Strategic Plan, Annual Plan and Administrative Plans. Although there are currently no public housing units in Newport Beach, the City continued to participate on the Advisory Committee and support OCHA's efforts (1) in expanding affordable housing opportunities for Section 8 Voucher recipients, and (2) ensuring OCHA goals are consistent with the City's Consolidated Plan and Housing Element.

#### **Barriers to Affordable Housing**

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

During the implementation of the 2010-2015 Consolidated Plan, the City implemented the following actions to reduce barriers to affordable housing:

- Released a Request for Proposals to the housing development community to receive proposals for the creation of new affordable housing units using the over \$4 million of the City's Affordable Housing Fund.
- Continued to monitor all regulations, ordinances, departmental processing procedures, and residential development fees to ensure these requirements do not excessively constrain affordable residential development.
- Continued to offer density bonus incentives for the development of affordable housing pursuant to state density bonus requirements and Newport Beach Housing Element.
- Offered fee waivers to developers of affordable housing.

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

The City of Newport Beach does not receive HOME funds.



# III. HOMELESS NEEDS

#### III. HOMELESS NEEDS

#### **Homeless Needs**

1. Identify actions taken to address needs of homeless persons.

The Strategic Plan addresses the needs of persons who are homeless and are at risk of homelessness through the implementation of program activities designed to meet the following objectives:

- 1. Preserve the supply of emergency and transitional units available
- 2. Assist homeless and those at risk of homelessness
- Assist homeless battered women and children

#### Preserve the supply of emergency and transitional units available

Three (3) of the public service agencies receiving CDBG funds from the City provided emergency or transitional housing for homeless persons in Orange County. These agencies and programs included:

- Human Options Emergency Shelter for Battered Women;
- Families Forward Transitional Housing Programs; and
- Serving People in Need (GAPP) Guided-Assistance Permanent Placement Housing Program.

#### Assist homeless and those at risk of homelessness

The City of Newport Beach provided financial assistance to Serving People In Need (SPIN), Families Forward, and Age Well Senior Services to provide access to recovery programs to homeless and low income individuals who otherwise could not afford such services. The program includes one month of room and board, counseling, and supplemental services focused on employment, medical assistance, and legal assistance. Home delivery meals twice daily to homebound persons to age, illness or disability.

#### Assist homeless battered women and children

The City of Newport Beach provided financial assistance to Human Options under the Domestic Violence Intervention/Prevention Program to provide temporary emergency shelter to battered and abused women and their children. This program also receives referrals through the Courthouse Family violence Outreach Center, Interval House Project, and Transitional Housing Project.

2. Identify actions to help homeless persons make the transition to permanent housing and independent living.

In order to address homelessness in an effective, comprehensive manner, HUD asks cities to participate in the Continuum of Care (CoC) – a coordinated effort

amongst numerous public and private agencies to end homelessness and to prevent homelessness. The components of a continuum include homeless prevention, emergency shelter, transitional shelter, permanent supportive housing, and supportive services. The overall objective is to move homeless persons and families outside the service delivery system into emergency housing, then to transitional housing, and finally to self-sufficiency or permanent supportive housing.

The City of Newport Beach actively participates in the Orange County Continuum of Care, a collaboration of other city jurisdictions, non-profit organizations, and local groups and charities. The City has provided input into the development of strategies to meet homeless needs. The City also funded several non-profits that are part of the CoC, including:

Prevention: Fair Housing Foundation and Human Options

Emergency Shelter: Human Options & Families Forward

Transitional Housing: Families Forward

Permanent Housing: Serving People In Need

Supportive Services: Families Forward, Human Options, and SPIN

#### **HOMELESS AND HIV/AIDS**

#### 5-Year Strategy:

Support a continuum of services in support of the City's and County's effort to end homeless and improve the quality of life for persons living with HIV/AIDS

Outcome/Objective	Planned Activities	Performance	2014	2014
Statements		Indicator	Goals	Achievements
Accessibility / Suitable Living Environments	Homeless Prevention Programs  Transitional Housing  Emergency Shelter to Victims of Domestic Violence  Transitional Housing and Support Services for Victims of Domestic Violence  Case Management and Other Services	People	145	205

#### 3. Identify new Federal resources obtained from Homeless SuperNOFA.

The City of Newport Beach supports the County of Orange Housing and Community Services Department and the Orange County Partnership in their efforts to secure funds to end homelessness. In 2014, the County of Orange and OC partnership secured \$19.5 million for the region through the Competitive Homeless SuperNOFA. While none of the funded projects are located in the City of Newport Beach, the

region as a whole will benefit from the following new programs that were awarded funding in the Homeless SuperNOFA:

- American Family Housing: \$291,729 for 36 beds, supportive services, and operations to provide transitional housing to homeless
- Collette's Children's Home: \$148,117 for 24 beds, supportive services, operations, leasing and HMIS to provide transitional housing to homeless
- Collette's Children's Home: \$126,260 for 24 beds, supportive services, operations, leasing, and HMIS to provide transitional housing to homeless
- Eli Home: \$534,263 for 28 beds, supportive services, operations, leasing and HMIS to provide transitional housing to homeless
- **John Henry Foundation**: \$149,509 for 6 units, supportive services and operations to provide permanent housing to homeless
- Orange County Housing Authority: \$3,281,147 for 174 Housing Certificates for tenant-based rental assistance for disabled homeless
- Orange County Housing Authority: \$581,851 for 30 Housing Certificates for tenant-based rental assistance for disabled homeless
- Orange County Housing Authority: \$536,589 for 30 Housing Certificates for tenant-based rental assistance for disabled homeless
- Orange County Housing Authority: \$1,059,971 for 58 Housing Certificates for tenant-based rental assistance for disabled homeless
- Orange County Housing Authority: \$734,157 for 40 Housing Certificates for tenant-based rental assistance for disabled homeless
- OC Partnership: \$499,646 for HMIS to provide support services to providers who serve homeless subpopulations
- Veterans Family Housing: \$218,579 for 24 beds, supportive services, operations and leasing to provide transitional housing to homeless
- Veterans Village: \$216,259 for 28 beds, supportive services, operations, leasing and HMIS to provide transitional housing to homeless

In addition to the agencies listed above, another thirty-seven (37) agencies received funds from the SuperNOFA award.

#### **Specific Homeless Prevention Elements**

1. Identify actions taken to prevent homelessness.

#### Fair Housing Foundation – Fair Housing

The City of Newport Beach provided financial assistance to continue to provide fair housing and landlord/tenant mediation to ensure universal access to fair housing to low and moderate income residents.

## Serving People in Need (SPIN) – GAPP (Guided-Assistance Permanent Placement Housing Program

This program provided access to homeless families and individuals who are residents of Newport Beach and need assistance for various housing issues including move-in assistance, rent to prevent eviction and rapid re-housing.

#### **Human Options – Emergency Shelter for Battered Women**

The City of Newport Beach provided financial assistance to provide for emergency shelter, food, clothing, counseling, and legal advocacy to battered women and their children to ensure availability/accessibility of suitable living environment.

#### Families Forward –Transitional Housing

The City of Newport Beach provided financial assistance. This program transits struggling families from crisis to stability and self-sufficiency.

#### **Emergency Solutions Grants (ESG)**

The City of Newport Beach does not receive ESG funds.



# IV. COMMUNITY DEVELOPMENT

#### IV. COMMUNITY DEVELOPMENT

#### **Community Development**

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

The primary objective of CDBG Program is the development of viable urban communities, including decent housing, a suitable living environment and expanding economic opportunities, principally for persons of low- and moderate-income.

Accordingly, the City of Newport Beach developed a Consolidated Plan – One-Year Action Plan that gave priority to those activities benefitting low- and moderate-income people.

Through public meetings and public hearings in the development of the Consolidated Plan, the City provided residents and service providers an opportunity to help identify the City's major needs and thereby assist in the establishment of long and short term community development objectives.

During the 2014-2015 fiscal year, the City expended CDBG funds in a manner consistent with meeting the National Objectives of the program. 100% of the CDBG funds expended were for activities that benefit low to moderate income persons. The percentage includes Administration and Planning activities.

The following is a list of activities that were undertaken:

- Fair Housing and Landlord/Tenant Mediation
- Community Resource Center for Battered and Abused Spouse
- Emergency/Transitional Housing Shelter
- Senior Services
- Permanent Placement Housing Services
- Youth Employment Services

#### **PUBLIC SERVICES**

5-Year Strategy: Contribute to the well-being of individuals, families, and neighborhoods				
Outcome/Objective Statements	Planned Activities	Performance Indicator	2014 Goals	2014 Achievements
	General Public Service Programs			
Accessibility / Suitable Living Environments	Employment and Other Training Programs			
	Food and Essential Services	People	25	10
	Family Services	·		
	Health Services			
	Youth Services			

The following is a list of CDBG capital improvement projects that were implemented:

Section 108 Loan Repayment (Balboa Village Improvements)

#### **PUBLIC FACILITIES**

5-Year Strategy:
Provide access to local public facilities that contribute to community and neighborhood
development

Outcome/Objective	Planned Activities	Performance	2014	2014
Statements		Indicator	Goals	Achievements
Sustainability / Suitable Living Environments	Section 108 Loan Repayment – Balboa Village Improvements	Public Facilities	1	1

#### 2. Changes in Program Objectives

a. Identify the nature of and the reasons for any changes in program objectives and how the jurisdiction would change its program as a result of its experiences.

The City made adjustments to its 5-Year Consolidated Plan goals on April 22, 2014. A copy of the approved Substantial Amendment was submitted along with the CAPER for the 2013-2014 program year.

- 3. Assessment of Efforts in Carrying Out Planned Actions
  - a. Indicate how grantee pursued all resources indicated in the Consolidated Plan.
  - b. Indicate how grantee provided certifications of consistency in a fair and impartial manner.
  - c. Indicate how grantee did not hinder Consolidated Plan implementation by action or willful inaction.

The City pursued all resources described in the 2014-2015 One-Year Action Plan. The City provided certifications of consistency upon request to non-profits that were pursuing activities and projects that worked toward meeting the strategic objectives and national objectives found in the Consolidated Plan and the Orange County Housing Authority (OCHA) for its Annual Plan. The City did not hinder the implementation of any portion of the Consolidated Plan through any action or willful inaction.

- 4. For Funds Not Used for National Objectives
  - a. Indicate how use of CDBG funds did not meet national objectives.
  - b. Indicate how did not comply with overall benefit certification.

According to the CDBG Grantee Performance Report generated by HUD's Integrated Disbursement and Information System (IDIS), all CDBG funded activities, with the exception of administration, fair housing, and Section 108 repayments, satisfied the Low/Moderate Income national objective.

In the 2014-2015 One-Year Action Plan, the City certified that at least 70 percent of all CDBG funded activities would primarily benefit low and moderate-income persons. According to the CDBG Financial Summary Report (PR26) generated by HUD's Integrated Disbursement and Information System (IDIS), 100% of the City's CDBG expenditures went toward satisfying the national objective of serving persons of low- and moderate-income.

- 5. Anti-displacement and Relocation for activities that involve acquisition, rehabilitation or demolition of occupied real property
  - a. Describe steps actually taken to minimize the amount of displacement resulting from the CDBG-assisted activities.
  - b. Describe steps taken to identify households, businesses, farms or nonprofit organizations who occupied properties subject to the Uniform Relocation Act or Section 104(d) of the Housing and Community Development Act of 1974, as amended, and whether or not they were displaced, and the nature of their needs and preferences.
  - c. Describe steps taken to ensure the timely issuance of information notices to displaced households, businesses, farms, or nonprofit organizations.

The City did not undertake any CDBG-funded activities that involved acquisition, displacement or relocation.

- 6. Low/Mod Job Activities for economic development activities undertaken where jobs were made available but not taken by low- or moderate-income persons
  - a. Describe actions taken by grantee and businesses to ensure first consideration was or will be given to low/mod persons.
  - b. List by job title of all the permanent jobs created/retained and those that were made available to low/mod persons.

c. If any of jobs claimed as being available to low/mod persons require special skill, work experience, or education, provide a description of steps being taken or that will be taken to provide such skills, experience, or education.

The City did not undertake any CDBG-funded activities using the economic development or job creation national objective.

- 7. Low/Mod Limited Clientele Activities for activities not falling within one of the categories of presumed limited clientele low and moderate income benefit
  - a. Describe how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of whom are low- and moderate-income.

The City funded several activities on the basis that at least 51 percent of the beneficiaries of the service would be of low- or moderate-income. All funded services that qualified as a Low/Mod Clientele activity either served homeless persons, who qualify as a presumed benefit sub-population, or verified the income of the beneficiary upon intake. At least 51 percent of beneficiaries for each CDBG-funded activity were documented or presumed to be of low- and moderate-income.

- 8. Program income received
  - a. Detail the amount of program income reported that was returned to each individual revolving fund, e.g., housing rehabilitation, economic development, or other type of revolving fund.
  - b. Detail the amount repaid on each float-funded activity.
  - c. Detail all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other.
  - d. Detail the amount of income received from the sale of property by parcel.

The City did not receive CDBG program income during the 2014-2015 program year.

- 9. Prior period adjustments where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:
  - a. The activity name and number as shown in IDIS;
  - The program year(s) in which the expenditure(s) for the disallowed activity(ies) was reported;
  - c. The amount returned to line-of-credit or program account; and
  - d. Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

There were no prior period adjustments.

- 10. Loans and other receivables
  - a. List the principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.

- b. List the total number of other loans outstanding and the principal balance owed as of the end of the reporting period.
- c. List separately the total number of outstanding loans that are deferred or forgivable, the principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.
- d. Detail the total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.
- e. Provide a List of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.

The City did not use CDBG funds for any float-funded activities.

- 11. Lump sum agreements
  - a. Provide the name of the financial institution.
  - b. Provide the date the funds were deposited.
  - c. Provide the date the use of funds commenced.
  - d. Provide the percentage of funds disbursed within 180 days of deposit in the institution.

The City has no lump sum agreements.

- 12. Housing Rehabilitation for each type of rehabilitation program for which projects/units were reported as completed during the program year
  - a. Identify the type of program and number of projects/units completed for each program.
  - b. Provide the total CDBG funds involved in the program.
  - c. Detail other public and private funds involved in the project.

The City does not use CDBG funds for housing rehabilitation.

- 13. Neighborhood Revitalization Strategies for grantees that have HUD-approved neighborhood revitalization strategies
  - a. Describe progress against benchmarks for the program year. For grantees with Federally-designated EZs or ECs that received HUD approval for a neighborhood revitalization strategy, reports that are required as part of the EZ/EC process shall suffice for purposes of reporting progress.

The City did not have a Neighborhood Revitalization Strategy Area in program year 2014-2015.

#### **Antipoverty Strategy**

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

During the 2014-2015 program year, the City provided CDBG funding to support several programs to maintain or increase the client's level of self-sufficiency and ability to escape poverty. The following programs directly assisted low- and moderate-income persons:

- 1. Age Well Senior Services: Home-Delivered Meal Program
- 2. Human Options: Emergency Shelter for Battered Women
- 3. Families Forward: Transitional Housing
- 4. SPIN: Guided-Assistance Permanent Placement Housing Services
- 5. Youth Employment Services: Employment Services for Youth



# V. Non-Homeless Special Needs

#### V. NON-HOMELESS SPECIAL NEEDS

#### **Non-homeless Special Needs**

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

The City funded a number of programs that address the special needs of persons that are not homeless but require supportive housing. These programs include:

#### Age Well Senior Services Home-Delivered Meal Program

Provided home delivered meals to seniors and disabled persons to reduce the possibility of institutionalization.

#### Human Options – Battered and Abused Spousal Program

Provided a wide variety of counseling and educational programs to help victims and their family members deal with the effects of domestic violence. Services also include emergency shelters and transitional housing.

#### SENIOR SERVICES

SEIVIOR SERVICES											
5-Year Strategy: Provide quality supportive services so elderly residents can live as independently as possible											
Outcome/Objective Statements	Planned Activities	Performance Indicator	2014 Goals	2014 Achievements							
Accessibility /Suitable Living Environments	General Senior Programs Information and Referral Programs Food and Essential Services Senior Transportation Services	People	130	105							

#### **SPECIAL NEEDS/NON-HOMELESS**

#### 5-Year Strategy:

Help persons with special needs live as independently as possible

Outcome/Objective Statements	Planned Activities	Performance Indicator	2014 Goals	2014 Achievements
Accessibility / Suitable Living Environments	Battered and Abused Spousal Programs  Food & Essential Services  Referral and Case Management Services  Employment Training and placement for persons with Disabilities	People	12	18
	Upgrade Public Facilities with ADA Improvements	Public Facilities	0	0
	Substance Abuse Rehabilitation Services	People	0	0

#### **PUBLIC SERVICES**

#### 5-Year Strategy:

Contribute to the well-being of individuals, families, and neighborhoods

	, ,			
Outcome/Objective Statements	Planned Activities	Performance Indicator	2014 Goals	2014 Achievements
Accessibility / Suitable Living Environments	General Public Service Programs  Employment and Other Training Programs  Food and Essential Services  Family Services  Health Services  Youth Services	People	25	10

#### **Specific HOPWA Objectives**

The City of Newport Beach does not receive HOPWA funds.



## VI. OTHER NARRATIVE

#### VI. OTHER NARRATIVE

1. Include any CAPER information that was not covered by narratives in any other section.

### Economic Opportunity / Minority Business Enterprise / Women-Owned Business Enterprise (MBE-WBE)

As an Entitlement recipient of CDBG funds, the City of Newport Beach is required to provide business opportunities to minority and women-owned businesses in connection with the activities funded through the CDBG grant. This requirement is applicable to contracting and subcontracting opportunities funded in whole or in part with the federal housing and community development assistance provided to the City as a grantee. OMB Circular A-102 states that "It is national policy to award a fair share of contracts to small and minority business firms. Grantees shall take similar appropriate affirmative action to support of women's enterprises and are encouraged to procure goods and services from labor surplus areas." The Uniform Administrative Requirements of 24 CFR 85.36(e) require the City to "take all necessary affirmative steps to assure that minority firms, women's business enterprises, and labor surplus area firms are used when possible." Further, the City is required under §570.507(b) -Reports (24 CFR Part 570, CDBG Final Rule) to submit a report to the U.S. Department of Housing and Urban Development (HUD) on the City's MBE-WBE contracting and subcontracting activity generated through the expenditure of HUD funds.

To comply with these requirements, the City includes MBE-WBE firms on its bid solicitation lists and encourages MBE-WBE firms to compete for CDBG-funded construction contracts. The City ensures that the Contract-Subcontract Activity Report and the MBE-WBE Summary Report are submitted to the Los Angeles Field Office of the U.S. Department of Housing and Urban Development as required.



# **APPENDICES**



# APPENDIX "A" SUMMARY OF ANNUAL OBJECTIVES

#### **HOUSING**

5-Year Strategy: Preserve and improve the existing housing stock and ensure equal access

#### **Summary of Specific Annual Objectives**

Specific Obj. #	Outcome/Objective Specific Annual Objectives	Sources of Funds	Performance Indicators	Year	Expected Number	Actual Number	Percent Completed
DH-1	Availability/Accessibility of Decent Housing						
	Section 8 Housing Choice Voucher - Maintain	Section 8		2010	478	409	86%
	existing level of Section 8 housing vouchers and	Section o		2011	478	497	104%
	rent-restricted units within the City at risk of conversion to market rate housing through	In-Lieu Fee	Housing Units	2012	478	495	104%
	refinancing.	III-Lieu Fee		2013	478	516	108%
	3			2014	478	516	108%
			MULTI-YEAR GOAL	2390	2433	102%	
	Housing Rehabilitation Programs & Utility	CDBG		2010	0		0%
	Connection Programs - Prevent deterioration of property and provide financial assistance for repair, rehabilitation, and utility underground	СБВО		2011	0		0%
DU 4 (4)			Housing Units	2012	0		0%
DH-1 (1)	hook-ups to low- and moderate-income			2013	0		0%
	households.			2014	0		0%
	CANCELED by Substantial Amendment in FY		MULTI-YEAR GOAL		0	0	0%
	Fair Housing Program - Ensure universal	CDBG		2010	160	160	100%
	access to fair housing choice within the City.	CDBG		2011	160	161	101%
			People	2012	160	187	117%
				2013	160	204	128%
				2014	160	191	119%
			MULTI-YEAR GOAL		800	903	113%

Fair Housing 903 people

Monitored Affordable 383 Section 108 vouchers 133

516

#### HOUSING

#### 5-Year Strategy: Expand the supply of affordable rental and homeownership housing opportunities

#### **Summary of Specific Annual Objectives**

Specific Obj. #	Outcome/Objective Specific Annual Objectives	Sources of Funds	Performance Indicators	Year	Expected Number	Actual Number	Percent Completed
DH-2	Affordability of Decent Housing						
	Acquisition of Affordability Covenants on Rental Properties - Expand the supply of	In-Lieu Fee		2010	0		0%
	housing units affordable to low- and moderate-income within the City.		Housing Units	2011			0% 0%
	CANCELED by Substantial Amendment in FY 13-14.			2013 2014			0% 0%
DH 2 (4)			MULTI-YEAR GOAL		0	0	0%
DH-2 (1)	Construction of Multi-Family Affordable	Density Bonus		2010	0		0%
	I lousing office - increase supply of flousing	Density Bonus		2011	0		0%
	units affordable to low- and moderate- income households through new	Tay Oradita	Housing Units	2012	0		0%
	construction.	Tax Credits		2013	0		0%
	CANCELED by Substantial Amendment in	Ctoto LIOME		2014	0		0%
	FY 13-14.	State HOME	MULTI-YEAR GOAL		0	0	0%

#### SENIOR SERVICES

5-Year Strategy: Provide quality supportive services so elderly residents can live as independently as possible

#### **Summary of Specific Annual Objectives**

Specific Obj. #	Outcome/Objective Specific Annual Objectives	Sources of Funds	Performance Indicators	Year	Expected Number	Actual Number	Percent Completed
SL-1	Availability/Accessibility of Suitable Living E						
	Improve supportive services for elderly	CDBG		2010	130	142	109%
	residents through:	CDBG		2011	130	145	112%
SI 4 (4)	- General Senior Programs - Information and Referral Services		People	2012	130	112	86%
SL-1 (1)	- Food and Essential Services			2013	130	119	92%
	- Senior Transportation Services			2014	130	105	81%
			MULTI-YEAR GOAL		650	623	95.8%

AGE WELL - Delivered Meals: 623 seniors

Friends of OASIS: Senior Transportation - Monthly Social Gatherings FY 14-15 - Activity Canceled

#### SPECIAL NEEDS/NON-HOMELESS

5-Year Strategy: Help persons with special needs live as independently as possible

#### **Summary of Specific Annual Objectives**

Specific Annual Objectives  SL-1 Availability/Accessibility of Suitable Living Environment			
Increase services to low- and moderate-income  CDBG	12	13	108%
persons with special needs through.	12	14	117%
- Battered and Abused Spousal Programs - Food and Essential Services  People  2012	12	4	33%
- Referral and Case Management Services 2013	12	16	133%
- Employment Training and Placement of	12	18	150%
Persons with Disabilities MULTI-YEAR GOAL	60	65	108.3%
Upgrade Public Facilities with ADA Improvements - CDBG 2010			0%
Increase accessibility of persons with disabilities to 2011			0%
public facilities.	1	1	0%
2013 2014			0% 0%
MULTI-YEAR GOAL	1	1	100.0%
Substance Abuse Pehabilitation Services Increase	8	8	100%
supportive services for persons suffering from CDBG 2011	7	7	100%
substance abuse. People 2012	7	7	100%
2013	0	0	0%
MULTI-YEAR GOAL	0 <b>22</b>	0 <b>22</b>	0% 100.0%

Human Options 65 people

SPIN - SARS 22 people (2 Years 13-14 & 14/15)

#### HOMELESS AND HIV/AIDS

5-Year Strategy: Support a continuum of services in support of the City's and County's effort to end homeless and assist in improving the quality of life for persons with HIV/AIDS

#### **Summary of Specific Annual Objectives**

Specific Obj. #	Outcome/Objective Sources of Funds Performance Indicators Specific Annual Objectives		Performance Indicators	Year Expected Number		Actual Number	Percent Completed
SL-1	Availability/Accessibility of Suitable Living Envir	ronment					
	Preserve the supply of emergency and transitional housing, increase supportive services for persons living with HIV/AIDS, and improve services for	CDBG		2010	145	144	99%
	homeless persons and prevent those at-risk of homelessness through: - Homeless Prevention Programs - Transitional Housing - Emergency Shelter to Victims of Domestic Violence - Transitional Housing and Support Services for Victims of Domestic Violence - Case Management and Other Services			2011	145	147	101%
SL-1 (3)			People	2012	145	150	103%
02 1 (0)				2013	145	171	118%
				2014	145	205	141%
			MULTI-YEAR	GOAL	725	817	112.7%

 14/15
 5-Yrs.

 Families Forward
 190
 786

 SPIN-GAPP
 15
 31

 Total:
 205
 817

#### **PUBLIC SERVICES**

5-Year Strategy: Contribute to the well-being of individuals, families, and neighborhoods

#### **Summary of Specific Annual Objectives**

Specific Obj. #	Outcome/Objective Specific Annual Objectives	Sources of Funds	Performance Indicators	Year	Expected Number	Actual Number	Percent Completed
SL-1	Availability/Accessibility of Suitable Living E	nvironment					
		•					
	Provide and improve public services to low-	CDBG		2010	369	369	100%
	and moderate-income persons through: - General Public Services	0000		2011	404	404	100%
SL-1 (4)	- Employment and Other Training Programs		People	2012	25	25	100%
3L-1 (4)	Food and Essential Services Family Services			2013	25	21	84%
	- Health Services		2014	25	10	40%	
	- Youth Services		MULTI-YEAR	GOAL	848	829	97.8%

(YES) Youth Employment Serv. 56 (3 years - 12/13, 13/14 & 14/15)

SOS - Save Our Selves 773 ( 2 years - 10/11 & 11/12)

#### **PUBLIC FACILITIES**

5-Year Strategy: Provide access to local public facilities that contribute to community and neighborhood development

#### **Summary of Specific Annual Objectives**

Specific Obj. #	Outcome/Objective Specific Annual Objectives	Sources of Funds	Performance Indicators	Year	Expected Number	Actual Number	Percent Completed
SL-3	Sustainability of Suitable Living Environmen						
	Repayment Section 108 Loan / Balboa Village			2010	1	1	100%
	infrastructure in order to eliminate blight, blighting influences, and prevent deterioration of property. The improvements will stimulate	CDBG		2011	1	1	100%
01 0 (4)			Public Facility	2012	1	1	100%
SL-3 (1)				2013	1	1	100%
	future economic investments and create a suitable living environment.			2014	1	1	100%
	Suitable living environment.		MULTI-YEAR GOA	L	5	5	100.0%

Section 108 Loan



# APPENDIX "B" CPMP PROJECT SUMMARIES

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		d Comple	tion I	Date:	The goal of the City's CDBG program is to provide decent housing, housin										
	0/20	)15 e Category			choice, suitable living environment and economic opportunity for all residents, businesses and visitors. Staff responsible for CDBG										
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This project will provide a wide variety of counselling and educational programs to help victims and their family immorbs doed with the offects of domestic violence. CDBG funds will be used to pay for a portion of the salaries of staff who provide counselling and case management services and supplies used by staff.  Location:  Community Resource Center   Selection: Select	Proj	ect N														
and their family members deal with the effects of domestic violence. CDBG funds will be used to pay for a portion of the salaries of staff who provide counseling and case management services and supplies used by staff.  Location:    Priority Need Catagory	Des	cripti	ion:		IDIS Proje	ct #:	201	14-03		UOG	Code	e: CA				
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# APPENDIX "C" PROOF OF PUBLIC NOTICE



#### RECEIVED

7015 AUG 24 AM II: 00



#### Sold To:

City of Newport Beach - CU00072031 100 Civic Center Dr Newport Beach,CA 92660

#### Bill To:

City of Newport Beach - CU00072031 100 Civic Center Dr Newport Beach,CA 92660

> CITY OF NEWPORT BEACH NOTICE OF PUBLIC HEARING AND PUBLIC REVIEW PERIOD

NOTICE IS HEREBY GIVEN that on Tuesday, September 8, 2015, at 7:00 p.m. or soon thereafter as the matter shall be heard, a public hearing will be conducted in the City Council Chambers at 100 Civic Center Drive, Newport Beach. The City Council of the City of Newport Beach will consider the following:

Draft Consolidated Annual Performance and Evaluation Report (CAPER) 2014–2015- The City has prepared the draft CAPER for the Fiscal Year, beginning July 1, 2014, and ending June 30, 2015, as required by the U.S. Department of Housing and Urban Development. The draft CAPER provides a detailed account of how the City utilized its Community Development Block form (CORS) funds in Fiscal Year 2014–2015 to pursue the strategies, goals, and objectives proposed in the 2014–2015 One Year Action Plan to address the housing and community development needs identified in the 2010–2014 Consolidated Plan. The purpose of the Public Hearing for the CAPER is to allow the public the opportunity to comment on the CAPER for the one-year period that ended on June 30, 2015.

The review and approval of the 2014-2015 CAPER is not subject to the California Environmental Quality Act (\*CEQA\*) pursuant to Sections 15666(c)(2) (the activity will not result in a direct or reasonably foreseeable indirect physical change in the environment) and 15060(c)(3) (the activity is not a project as defined in Section 15378) of the CEQA Guidelines, California Code of Regulations, Title 14, Chapter 3, because it has no potential for resulting in physical change to the environment, directly or indirectly.

NOTICE IS HEREBY FUTHER GIVEN that the publication of this notice commences a minimum 15-day public review period. Copies of the draft CAPER will be available during the public review and comment period from August 24, 2015 to September 8, 2015 in the following locations:

Community Development Department – Bay B 100 Civic Center Drive Newport Beach, CA 92660

City of Newport Beach - Central Library

1000 Avocado Avenue Newport Beach, CA 92660

#### City Website

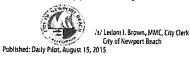
http://www.newportbeachca.gov/CDBGreports

#### **ACCESSIBILITY TO MEETINGS AND DOCUMENTS**

It is the objective of the City to comply with, Section 504 of the Rehabilitation Act of 1973, as amended, the Americans with Disabilities Act (ADA) of 1990 and the ADA Amendment Act of 2008, the Fair Housing Act, and the Architectural Barners Act in all respects. If you require public documents in an accessible format, the City will make reasonable efforts to accommodate your request. If you require a disability-related accommodation to attend or participate in a hearing or meeting, including auxiliary aids or services, please contact the City Clerk's Office at least 72 hours prior to the meeting at (949) 644-3005.

All interested parties may appear and present testimony at the public hearing in regard to this application, of you challenge this project in court, you may be inmited to raising only those issues you raised at the public hearing or in written correspondence delivered to the City, at, or prior to, the public hearing. The application may be continued to a specific future meeting date, and if such an action occurs, additional public notice of the continuance will not be provided. The immediate Friday prior to the public hearing the agenda, staff report, and documents may be reviewed at the City Clerk's Office, 100 City: Center Drive, Newport Beach, California, 92660 or at the City of Newport Beach website at <a href="https://www.newportbeachca.gov">www.newportbeachca.gov</a>, individuals not able to attend the meeting may contact the Placning Division or access the City's website after the meeting to review the action on the application.

Questions and written comments regarding the draft CAPER may be submitted during the public review and comment period commencing August 24, 2015, and concluding September 8, 2015, and should be addressed to Clint Whited, CDBG Consultant, at 100 Crist Center Drive, Newport Beach, CA 92660. You may also call (909) 476-6006 ext. 115 with any questions concerning the draft CAPER.





PROOF OF PUBLICATION (2015.5 C.C.P.)

STATE OF ILLINOIS County of Cook

I am a citizen of the United States and a resident of the County aforesaid; I am over the age of eighteen years, and not a party to or interested in the action for which the attached notice was published.

I am a principal clerk of the Newport Harbor News Press Combined With Daily Pilot, which was adjudged a newspaper of general circulation on June 19, 1952, Cases A24831 for the City of Newport Beach, County of Orange, and State of California. Attached to this Affidavit is a true and complete copy as was printed and published on the following date(s):

Aug 15, 2015

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated at Chicago, Illinois

on this 17 day of Alm, 2015

[signature]

435 N. Michigan Ave. Chicago, IL 60611

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draft CAPER.

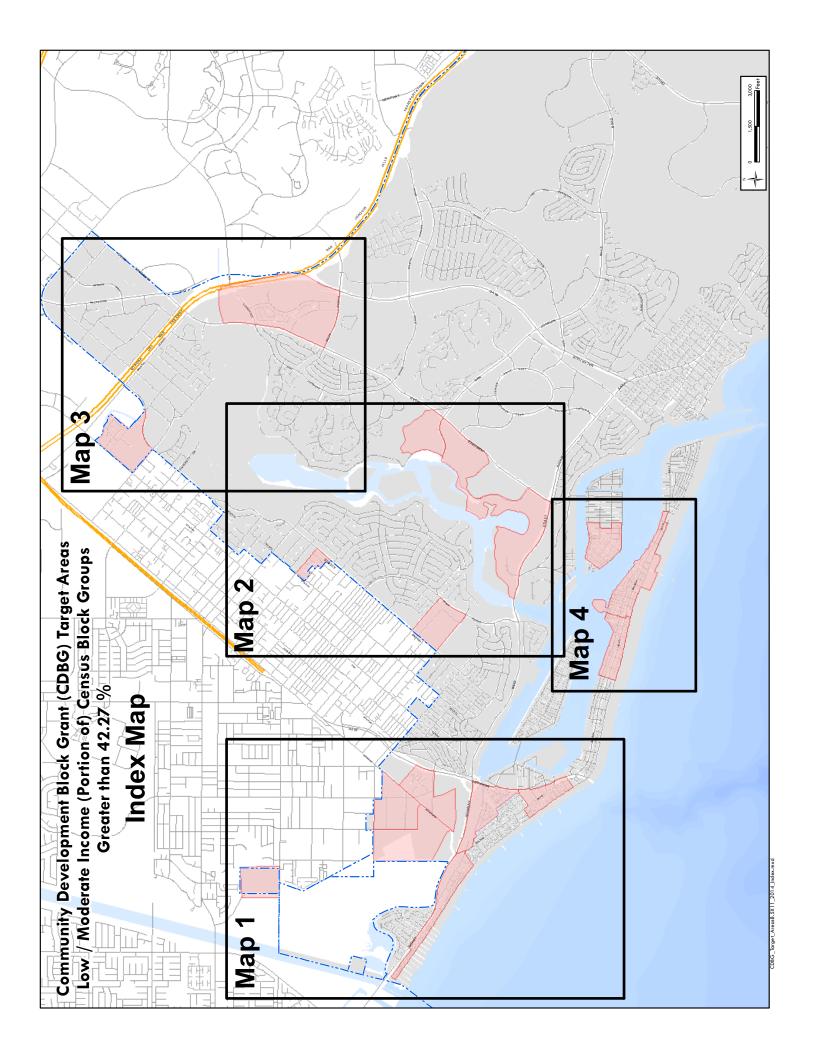
Leilani I. Brown, MMC, City Clerk

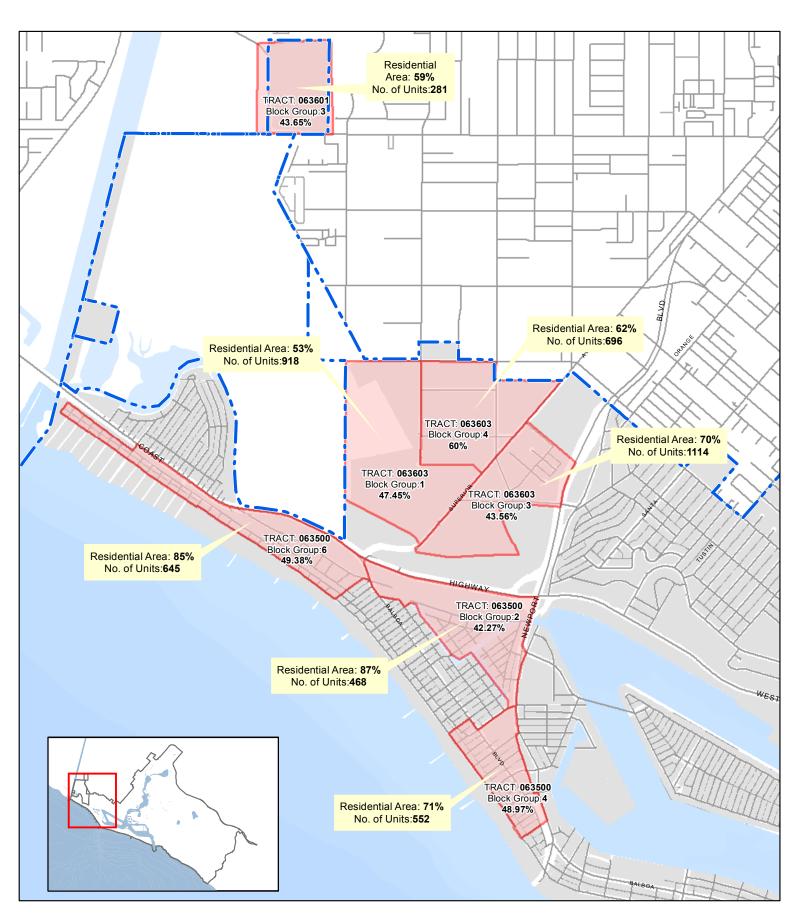
City of Newport Beach

Published: Daily Pilot, August 15, 2015

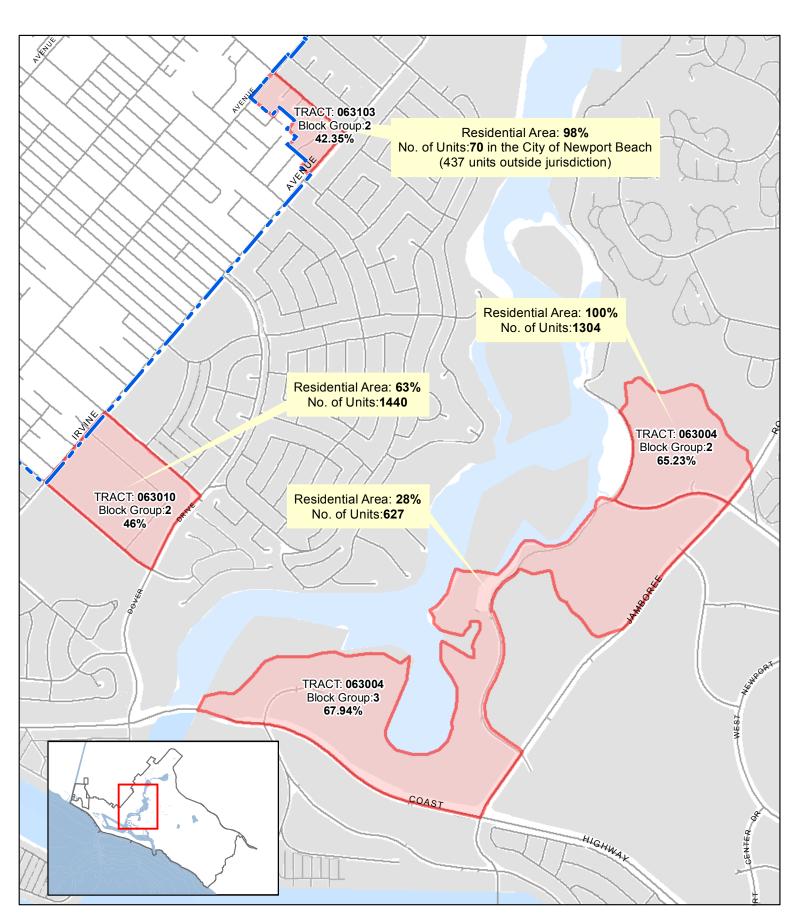


# APPENDIX "D" MAP

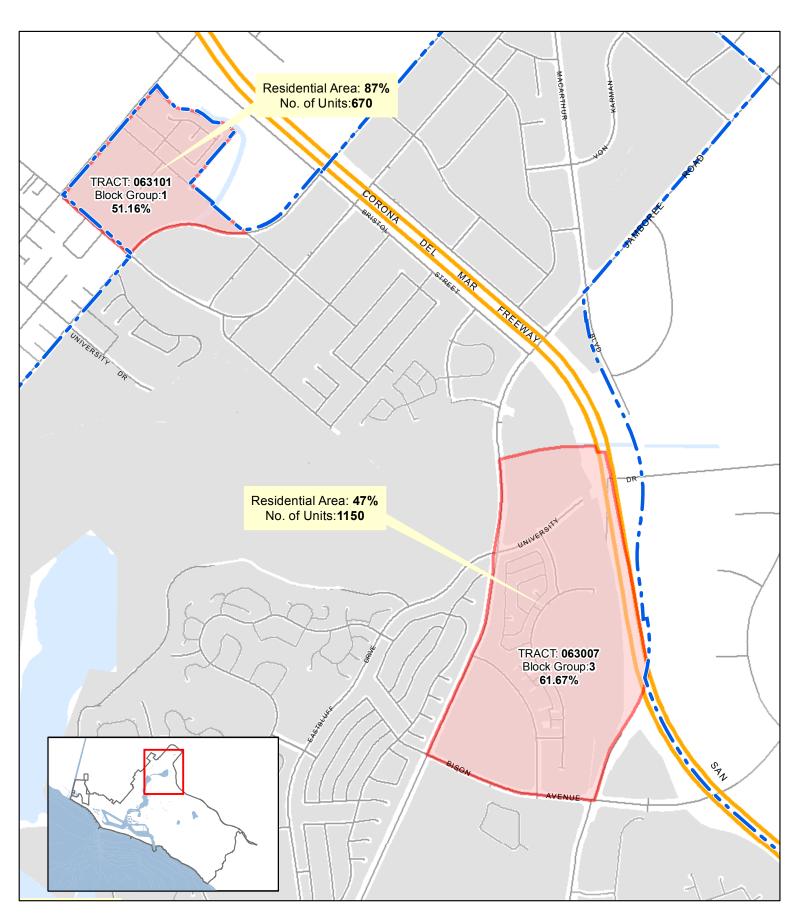




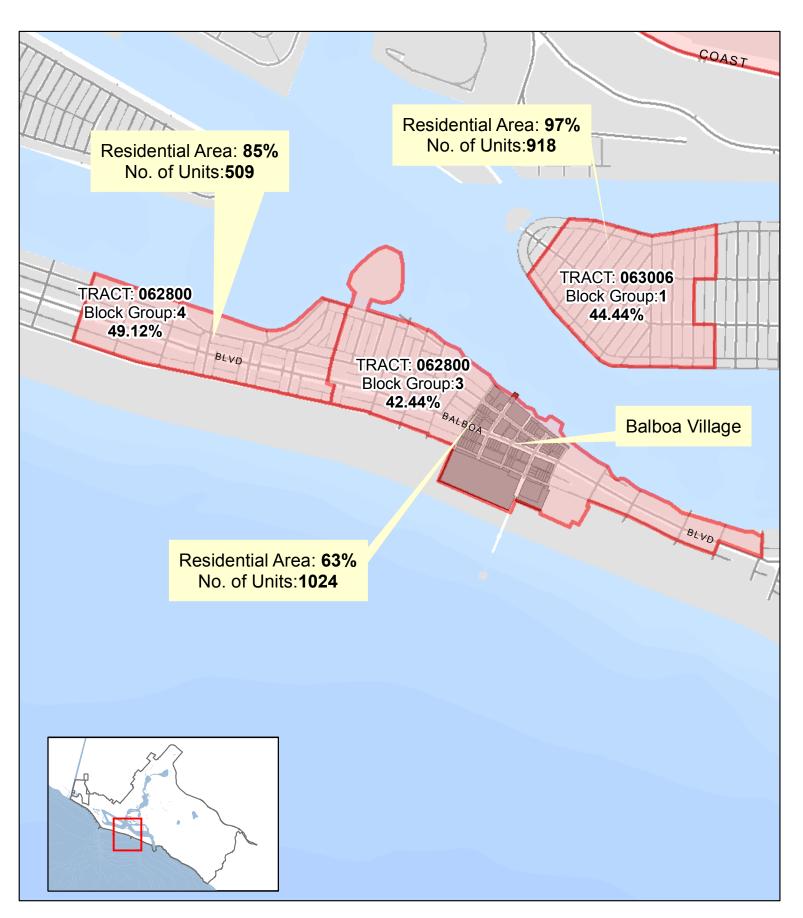
MAP 1 Community Development Block Grant (CDBG) Target Areas Low / Moderate Income (Portion of) Census Block Groups Greater than 42.27 %



MAP 2 Community Development Block Grant (CDBG) Target Areas Low / Moderate Income (Portion of) Census Block Groups Greater than 42.27 %



MAP 3 Community Development Block Grant (CDBG) Target Areas Low / Moderate Income (Portion of) Census Block Groups Greater than 42.27 %



MAP 4 Community Development Block Grant (CDBG) Target Areas
Low / Moderate Income (Portion of) Census Block Groups
Greater than 42.27 %



# APPENDIX "E" IDIS REPORTS

- 1. HUD GRANTS AND PROGRAM INCOME REPORT (PR01)
- 2. CDBG ACTIVITY SUMMARY REPORT (PR03)
- 3. SUMMARY OF CONSOLIDATED PLAN PROJECTS (PR06)
- 4. SUMMARY OF ACCOMPLISHMENTS (PR23)
- 5. CDBG FINANCIAL SUMMARY (PR26)
- 6. SECTION 3 SUMMARY REPORT

# U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

DATE: 9/18/2015 TIME: 7:04:34 PM PAGE: 1/1

# OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT PR01 - HUD Grants and Program Income

IDIS

Program Fund Type	Grantee Name	Grant Number	Authorized Amount	Suballocated Amount	Amount Committed to Activities	Net Drawn Amount	FY YTD Net Draw Amount	Available to Commit	Available to Draw Reca	pture Amount
CDBG EN	NEWPORT BEACH		\$423,000.00	\$0.00	\$423,000.00	\$423,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B90MC060546	\$406,000.00	\$0.00	\$406,000.00	\$406,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B91MC060546	\$453,000.00	\$0.00	\$453,000.00	\$453,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B92MC060546	\$469,000.00	\$0.00	\$469,000.00	\$469,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B93MC060546	\$472,000.00	\$0.00	\$472,000.00	\$472,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B94MC060546	\$513,000.00	\$0.00	\$513,000.00	\$513,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B95MC060546	\$534,000.00	\$0.00	\$534,000.00	\$534,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B96MC060546	\$520,000.00	\$0.00	\$520,000.00	\$520,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B97MC060546	\$515,000.00	\$0.00	\$515,000.00	\$515,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B98MC060546	\$492,000.00	\$0.00	\$492,000.00	\$492,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B99MC060546	\$495,000.00	\$0.00	\$495,000.00	\$495,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B00MC060546	\$498,000.00	\$0.00	\$498,000.00	\$498,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B01MC060546	\$518,000.00	\$0.00	\$518,000.00	\$518,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B02MC060546	\$490,000.00	\$0.00	\$490,000.00	\$490,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B03MC060546	\$426,000.00	\$0.00	\$426,000.00	\$426,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B04MC060546	\$437,000.00	\$0.00	\$437,000.00	\$437,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		B05MC060546	\$412,233.00	\$0.00	\$412,233.00	\$412,233.00	\$0.00	\$0.00	\$0.00	\$0.00
		B06MC060546	\$373,292.00	\$0.00	\$373,292.00	\$373,292.00	\$0.00	\$0.00	\$0.00	\$0.00
		B07MC060546	\$370,332.00	\$0.00	\$370,332.00	\$370,332.00	\$0.00	\$0.00	\$0.00	\$0.00
		B08MC060546	\$355,659.00	\$0.00	\$355,659.00	\$355,659.00	\$0.00	\$0.00	\$0.00	\$0.00
		B09MC060546	\$357,354.00	\$0.00	\$357,354.00	\$357,354.00	\$0.00	\$0.00	\$0.00	\$0.00
		B10MC060546	\$385,189.00	\$0.00	\$385,189.00	\$385,189.00	\$0.00	\$0.00	\$0.00	\$0.00
		B11MC060546	\$323,777.00	\$0.00	\$323,777.00	\$323,777.00	\$0.00	\$0.00	\$0.00	\$0.00
		B12MC060546	\$350,669.00	\$0.00	\$350,669.00	\$350,669.00	\$0.00	\$0.00	\$0.00	\$0.00
		B13MC060546	\$367,271.00	\$0.00	\$367,271.00	\$367,271.00	\$55,231.43	\$0.00	\$0.00	\$0.00
		B14MC060546	\$366,830.00	\$0.00	\$271,358.21	\$271,358.21	\$271,358.21	\$95,471.79	\$95,471.79	\$0.00
		NEWPORT BEACH Subtotal:	\$11,323,606.00	\$0.00	\$11,228,134.21	\$11,228,134.21	\$326,589.64	\$95,471.79	\$95,471.79	\$0.00
	EN Subtotal:	-	\$11,323,606.00	\$0.00	\$11,228,134.21	\$11,228,134.21	\$326,589.64	\$95,471.79	\$95,471.79	\$0.00
SL	NEWPORT BEACH	B00MC060546	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		B00MC060546-OLD	\$2,400,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,400,000.00	\$2,400,000.00	\$0.00
		NEWPORT BEACH Subtotal:	\$2,400,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,400,000.00	\$2,400,000.00	\$0.00
	SL Subtotal:	-	\$2,400,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,400,000.00	\$2,400,000.00	\$0.00
CDBG-R EN	NEWPORT BEACH	I B09MY060546	\$96,603.00	\$0.00	\$96,603.00	\$96,603.00	\$0.00	\$0.00	\$0.00	\$0.00
		NEWPORT BEACH Subtotal:	\$96,603.00	\$0.00	\$96,603.00	\$96,603.00	\$0.00	\$0.00	\$0.00	\$0.00
	EN Subtotal:	-	\$96,603.00	\$0.00	\$96,603.00	\$96,603.00	\$0.00	\$0.00	\$0.00	\$0.00
GRANTEE		-	\$11,420,209.00	\$0.00	\$11,324,737.21	\$11,324,737.21	\$326,589.64	\$2,495,471.79	\$2,495,471.79	\$0.00



# U.S. Department of Housing and Urban Development Office of Community Planning and Development Integrated Disbursement and Information System CDBG Activity Summary Report (GPR) for Program Year 2014 NEWPORT BEACH

Date: 03-Sep-2015

Time: 20:42

Page: 1

**PGM Year:** 1994

0002 - CONVERTED CDBG ACTIVITIES **Project:** 

**IDIS Activity:** 2 - CDBG COMMITTED FUNDS ADJUSTMENT

Status: Open 6/30/2001 12:00:00 AM

Location:

Objective:

Outcome:

Matrix Code:

Public Facilities and Improvement

National Objective:

Dorcon

**Initial Funding Date:** 

01/01/0001

**Description:** 

FUNDS DRAWN DOWN THROUGH LOCCS.

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
		Pre-2015		\$3,159,877.80	\$0.00	\$0.00
CDBG EN		1989	B89MC060546		\$0.00	\$423,000.00
		1990	B90MC060546		\$0.00	\$406,000.00
	EN	1991	B91MC060546		\$0.00	\$453,000.00
CDBG	CIN	1992	B92MC060546		\$0.00	\$469,000.00
		1993	B93MC060546		\$0.00	\$472,000.00
		1994	B94MC060546		\$0.00	\$513,000.00
		1995	B95MC060546		\$0.00	\$423,877.80
Total	Total			\$3,159,877.80	\$0.00	\$3,159,877.80

Dontor

Total

**Proposed Accomplishments** 

No week and a sector of	Owner	Renter	Total	Person
Number assisted:	Total Hispanic	Total Hispanic	Total Hispanic	Total Hispanic

White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		
Hispanic:					0	0		
Total:	0	0	0	0	0	0	0	0
Female-headed Households:					0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

# **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

PGM Year: 2013

Project: 0001 - CDBG Administration

IDIS Activity: 225 - CDBG Administration

Status: Completed 8/13/2014 12:00:00 AM

Location: ,

Objective: Outcome:

Matrix Code: General Program Administration (21A)

National Objective:

Initial Funding Date: 10/28/2013

#### Description:

This project provides for the overall administration of the CDBG Program, to include: preparation and submission of the Annual Action Plan and the CAPER, IDIS data input, provision of technical assistance, monitoring of all projects, and overall fiscal management.

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBC	EN	Pre-2015		\$60,026.40	\$0.00	\$0.00
CDBG	EIN	2013	B13MC060546		\$0.00	\$60,026.40
Total	Total			\$60,026.40	\$0.00	\$60,026.40

# **Proposed Accomplishments**

No make a menada tanda	C	Owner		Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:					0	0			
Black/African American:					0	0			
Asian:					0	0			
American Indian/Alaskan Native:					0	0			
Native Hawaiian/Other Pacific Islander:					0	0			
American Indian/Alaskan Native & White:					0	0			
Asian White:					0	0			
Black/African American & White:					0	0			
American Indian/Alaskan Native & Black/African American:					0	0			
Other multi-racial:					0	0			
Asian/Pacific Islander:					0	0			
Hispanic:					0	0			
Total:	0	0	0	0	0	0	0	0	

Female-headed Households:

Income Category:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

#### **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

0

**PGM Year:** 2013

**Project:** 0002 - Fair Housing Services

IDIS Activity: 226 - Fair Housing Services

Status: Completed 8/13/2014 12:00:00 AM Objective:

Location: , Outcome:

Matrix Code: Fair Housing Activities (subject to 20% National Objective:

Initial Funding Date: 10/28/2013

#### **Description:**

This project provides fair housing education, counseling, and enforcement services to current or potential Newport Beach residents, coupled with landlordtenant counseling services.

These services impact and benefit target CDBG areas and the City's extremely-low to moderate income population.

They help counteract unlawful housing discrimination and assist CDBG target areas in reducing blight.

Fair Housing provides the opportunity for landlords and tenants to correct wrongful housing policies or behavior.

It is estimated that, in Newport Beach, this program will address 8 allegations of housing discrimination that result in the opening of a case file, and will address approximately 235

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$12,000.00	\$0.00	\$0.00
CDBG	EIN	2013	B13MC060546		\$0.00	\$12,000.00
Total	Total			\$12,000.00	\$0.00	\$12,000.00

# Proposed Accomplishments Actual Accomplishments

Number accipted	C	wner	Ren	Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:					0	0			
Black/African American:					0	0			
Asian:					0	0			
American Indian/Alaskan Native:					0	0			
Native Hawaiian/Other Pacific Islander:					0	0			
American Indian/Alaskan Native & White:					0	0			
Asian White:					0	0			
Black/African American & White:					0	0			
American Indian/Alaskan Native & Black/African American:					0	0			
Other multi-racial:					0	0			
Asian/Pacific Islander:					0	0			
Hispanic:					0	0			
Total:	0	0	0	0	0	0	0	0	
Female-headed Households:					0				

Income Category:

income Category:	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

# **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

PGM Year: 2013

**Project:** 0003 - Human Options: Community Resource Center **IDIS Activity:** 227 - Human Options: Community Resource Center

Status: Completed 8/13/2014 12:00:00 AM

5540 Trabuco Rd Irvine, CA 92620-5744

Objective: Create suitable living environments

Outcome: Availability/accessibility

Matrix Code: Battered and Abused Spouses (05G) National Objective: LMC

Initial Funding Date: 10/28/2013

#### **Description:**

Location:

Human Options Center for Children and Families offers a wide variety of counseling and psychoeducational programs to help victims and their family members heal from the effects of domestic violence.

The proposed services include crisis intervention, individual adult counseling, family counseling, support groups, personal empowerment program (PEP), children's individual counseling, parenting education groups, information and referrals, community education, intake to Human Options' Emergency Shelter and legal advocacy.

#### Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBC	rn.	Pre-2015		\$6,436.82	\$0.00	\$0.00
CDBG	EN	2013	B13MC060546		\$0.00	\$6,436.82
Total	Total			\$6,436.82	\$0.00	\$6,436.82

# **Proposed Accomplishments**

People (General): 16

Number assisted:  White: Black/African American: Asian: American Indian/Alaskan Native:	Owner		Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	12	4
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	4	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0

Hispanic: Total:	0	0	0	0	0	0	0	0
	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>16</b>	<b>4</b>
Female-headed Households:	0		0		0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	13
Low Mod	0	0	0	3
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	16
Percent Low/Mod				100.0%

# **Annual Accomplishments**

Years	Accomplishment Narrative	# Benefitting
2013	1st Qtr. 7 unduplicated persons received one or more of the following services: counseling, emergency shelter, legal advocary or parenting clases.	
	2nd Qtr. 4 unduplicated persons received one or more of the services being provided.	
	3rd Qtr. 2 unduplicated persons received one or more of the services being provided.	
	4th Qtr. 3 unduplicated persons received one or more of the services being provided.	
	Total of unduplicated persons assisted this fiscal year is 16 persons.	

2013 **PGM Year:** 

0004 - Families Forward: Transitional Housing Program 228 - Families Forward: Transitional Housing Program **IDIS Activity:** 

Create suitable living environments Completed 8/13/2014 12:00:00 AM Objective: Status:

9221 Irvine Blvd Irvine, CA 92618-1645 Outcome: Availability/accessibility Location:

> Public Services (General) (05) National Objective: Matrix Code: LMC

**Initial Funding Date:** 10/28/2013

#### **Description:**

Project:

The Transitional Housing Program requires families to fully commit to making permanent changes in their lives that will result in achieving and maintaining self-sufficiency. The target population is homeless families and children.

The program provides case management and supportive services to households residing in Families Forward transitional housing units.

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$10,000.00	\$0.00	\$0.00
CDBG	EIN	2013	B13MC060546		\$0.00	\$10,000.00
Total	Total			\$10,000.00	\$0.00	\$10,000.00

# **Proposed Accomplishments**

People (General): 150

# **Actual Accomplishments**

No make an experienced	Owner		Rent	Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:	0	0	0	0	0	0	103	46	
Black/African American:	0	0	0	0	0	0	21	0	
Asian:	0	0	0	0	0	0	8	0	
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0	
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	2	0	
American Indian/Alaskan Native & White:	0	0	0	0	0	0	3	0	
Asian White:	0	0	0	0	0	0	0	0	
Black/African American & White:	0	0	0	0	0	0	0	0	
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0	
Other multi-racial:	0	0	0	0	0	0	18	5	
Asian/Pacific Islander:	0	0	0	0	0	0	0	0	
Hispanic:	0	0	0	0	0	0	0	0	
Total:	0	0	0	0	0	0	155	51	
Female-headed Households:	0		0		0				

# Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	107
Low Mod	0	0	0	48
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	155
Percent Low/Mod				100.0%

#### **Annual Accomplishments**

**Accomplishment Narrative** Years # Benefitting

2013 1st Qtr 101 unduplicated persons were assisted which comprise a total of 7 families. All 7 families were able to move into an appartment in the community are stably housed.

2nd Qtr. 28 unduplicated persons were assisted which comprise a total of 2 families and 5 individuals. Only one family left the program due to non-

compliance.

3rd Qtr. 5 unduplicated persons were assisted which comprise a total of 1 family.

4th Qtr. 21 unduplicated persons were assisted which comprise a total of 6 families.

Total of unduplicated persons assisted this fiscal year is 155 individuals which comprise a total of 17 families and 2 individuals.

PGM Year: 2013

Project: 0005 - Age Well Senior Services: Home Delivered Meals

**IDIS Activity:** 229 - Age Well Senior Serv: Home Delivered Meals

Status: Completed 8/13/2014 12:00:00 AM Objective: Create suitable living environments

LMC

24300 El Toro Rd Ste 2000 Suite 2000 Laguna Woods, CA Location:

Outcome: Availability/accessibility

92637-2777

Matrix Code: Senior Services (05A)

National Objective:

10/28/2013 **Initial Funding Date:** 

#### **Description:**

Age Well Senior Services will provide home-delivered meals to homebound senior citizens (62 or older) who are unable to prepare meals for themselves due to age, illness, or disability.

#### Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBC	EN	Pre-2015		\$16,000.00	\$0.00	\$0.00
CDBG	EIN	2013	B13MC060546		\$0.00	\$16,000.00
Total	Total			\$16,000.00	\$0.00	\$16,000.00

#### **Proposed Accomplishments**

People (General): 148

Number assisted:	0	Owner		Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:	0	0	0	0	0	0	118	2	
Black/African American:	0	0	0	0	0	0	0	0	
Asian:	0	0	0	0	0	0	1	0	
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0	
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0	

American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	119	2

0

Person

Female-headed Households:

Income Category:

Owner Renter

0 Extremely Low 0 0 64 Low Mod 0 0 0 22 Moderate 0 0 0 19 0 0 Non Low Moderate 14 0 0 Total 119

Percent Low/Mod 88.2%

#### **Annual Accomplishments**

Years Accomplishment Narrative #Benefitting
2013 1st Qtr. 63 unduplicated seniors were provided meals. A total of 7.755 meals were delivered during this guarter.

1st Qtr. 63 unduplicated seniors were provided meals. A total of 7,755 meals were delivered during this quarter. 2nd Qtr. 23 unduplicated seniors were provided meals. A total of 7,200 meals were delivered during this quarter. 3rd Qtr. 20 unduplicated seniors were provided meals. A total of 8,802 meals were delivered during this quarter. 4th Qtr. 13 unduplicated seniors were provided meals. A total of 8,619 meals were delivered during this quarter.

A total of 119 unduplicated seniors were provided meals and 32,376 meals were delivered during this fiscal year.

PGM Year: 2013

**Project:** 0006 - SPIN: Guided Assistance-Permanent Placement Housing Program

IDIS Activity: 230 - SPIN: GAPP Housing Program

Status: Completed 8/13/2014 12:00:00 AM Objective: Create suitable living environments

Location: 151 Kalmus Dr H-2 S Costa Mesa, CA 92626-5988 Outcome: Availability/accessibility

Total

Matrix Code: Public Services (General) (05) National Objective: LMC

0

0

Initial Funding Date: 10/28/2013

# Description:

The Guided Assistance to Permanent Placement Housing Program (GAPP) will provide access to appropriate housing to low-income and homeless families and individuals who are residents of Newport Beach, but who need assistance for various housing issues including move-in assistance, rent to prevent eviction and rapid re-houising.

SPIN will assist them with the costs of that housing need (paid to the provider, not the client) which is appropriate for their need, combine it with support services if appropriate and case management.

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBC	EN	Pre-2015		\$14,090.00	\$0.00	\$0.00
CDBG	EN	2013	B13MC060546		\$0.00	\$14,090.00
Total	Total			\$14,090.00	\$0.00	\$14,090.00

# **Proposed Accomplishments**

People (General): 10

# **Actual Accomplishments**

No mark and a consiste of	0		Rent	Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:	0	0	0	0	0	0	16	5	
Black/African American:	0	0	0	0	0	0	0	0	
Asian:	0	0	0	0	0	0	0	0	
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0	
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0	
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0	
Asian White:	0	0	0	0	0	0	0	0	
Black/African American & White:	0	0	0	0	0	0	0	0	
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0	
Other multi-racial:	0	0	0	0	0	0	0	0	
Asian/Pacific Islander:	0	0	0	0	0	0	0	0	
Hispanic:	0	0	0	0	0	0	0	0	
Total:	0	0	0	0	0	0	16	5	
Female-headed Households:	0		0		0				

# Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	10
Low Mod	0	0	0	6
Moderate	0	0	0	0

Non Low Moderate	0	0	0	0
Total	0	0	0	16
Percent Low/Mod				100.0%

#### **Annual Accomplishments**

Years	Accomplishment Narrative	# Benefitting
2013	1st Qtr. 2 unduplicated persons were assisted with the program totaling 1 family assisted.	
	2nd Qtr. 6 unduplicated persons were assisted consisting of 2 families.	
	3rd Qtr. 5 unduplicated persons were assisted consisting of 2 families.	
	4th Qtr. 5 unduplicated persons were assisted consisting of 1 family and 2 individuals.	
	Total of unduplicated persons assisted this fiscal year is 16 consisting of 6 families and 2 individuals.	

**PGM Year:** 2013

0007 - Youth Employment Serv.: Walking In Service for Youth Program **Project:** 

**IDIS Activity:** 231 - YES: Walk In Service Youth Program

Status: Completed 8/13/2014 12:00:00 AM

Create suitable living environments Objective:

114 E 19th St Costa Mesa, CA 92627-2807 Outcome: Availability/accessibility Location:

> Matrix Code: Public Services (General) (05) National Objective: LMC

**Initial Funding Date:** 10/28/2013

#### **Description:**

The YES Walk In Service for Youth Program will provide effective employment related services to youth from low- and moderate-income households.

Program services are provided by professional staff who hold bachelor's degrees and have at least five (5) years of experience, as well as from trained volunteers.

Services include: A two hour employment skills class where youth learn important basic skills such as how to fill out job applications; A two hour personal finance and money management class; A mock interview experience.

Upon completion of these program components, each youth receives up to three (3) job referrals upon each visit to YES.

#### Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$5,000.00	\$0.00	\$0.00
CDBG	EIN	2013	B13MC060546		\$0.00	\$5,000.00
Total	Total			\$5,000.00	\$0.00	\$5,000.00

# **Proposed Accomplishments**

People (General): 25

Alone beneralistado	O	wner	Rent	er		Total	F	Person
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	16	9
Black/African American:	0	0	0	0	0	0	2	0

0 0	
0	
0	
0	
0	
0	
0	
0	
0	
9	
	0 0 0 0 0 0 0

0

Income Category:

Female-headed Households:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	8
Low Mod	0	0	0	8
Moderate	0	0	0	5
Non Low Moderate	0	0	0	0
Total	0	0	0	21
Percent Low/Mod				100.0%

# **Annual Accomplishments**

Years	Accomplishment Narrative	# Benefitting
2013	1st Qtr. 6 unduplicated youths were assisted which included a total of 49 client contacts.	
	2nd Qtr. 7 unduplicated youths were assisted which included a total of 31 client contacts.	
	3rd Qtr. 4 unduplicated youths were assisted which included a total of 25 client contacts.	
	4th Qtr. 4 unduplicated youths were assisted which included a total of 25 client contacts.	
	Total of unduplicated youths assisted this fiscal year is 21 youths.	

0

0

PGM Year: 2013

Project: 0008 - Section 108 Loan Repayment IDIS Activity: 232 - Section 108 Loan Repayment

Status: Completed 8/13/2014 12:00:00 AM Objective: Location: , Outcome:

Matrix Code: Planned Repayment of Section 108

National Objective:

**Initial Funding Date:** 10/28/2013

# Description:

Funds will be used to repay the City's Section 108 Loan.

The loan was used to partially fund public improvements to the Balboa Target Area totaling \$8 million.

The scope of work includes the Balboa Village Pedestrian and Streetscape Plan, Street Improvements to Balboa Blvd., Pier Parking Lot, and Pier Plaza and Lot A connecting access to Main Street.

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
		Pre-2015		\$204,722.40	\$0.00	\$0.00
CDBG	EN	2012	B12MC060546		\$0.00	\$16,236.05
		2013	B13MC060546		\$0.00	\$188,486.35
Total	Total			\$204,722.40	\$0.00	\$204,722.40

# **Proposed Accomplishments**

# **Actual Accomplishments**

Number and add to	Owner		Rent	Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:					0	0			
Black/African American:					0	0			
Asian:					0	0			
American Indian/Alaskan Native:					0	0			
Native Hawaiian/Other Pacific Islander:					0	0			
American Indian/Alaskan Native & White:					0	0			
Asian White:					0	0			
Black/African American & White:					0	0			
American Indian/Alaskan Native & Black/African American:					0	0			
Other multi-racial:					0	0			
Asian/Pacific Islander:					0	0			
Hispanic:					0	0			
Total:	0	0	0	0	0	0	0	0	

0

Income Category:

Female-headed Households:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	

 Moderate
 0

 Non Low Moderate
 0

 Total
 0
 0

Percent Low/Mod

#### **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

PGM Year: 2014

Project: 0001 - CDBG Administration

IDIS Activity: 233 - CDBG Administration

Status: Completed 6/30/2015 12:00:00 AM

Location: Outcome:

Matrix Code: General Program Administration (21A) National Objective:

Initial Funding Date: 11/20/2014

# **Description:**

This project provides for the overall administration of the CDBG Program, to include: preparation and submission of the Annual Action Plan and the CAPER, IDIS data input, provision of technical assistance, monitoring of all projects, and overall fiscal management.

Objective:

0

Funds will also be used to monitor existing affordable housing covenants.

# **Financing**

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
		Pre-2015		\$61,366.00	\$0.00	\$0.00
CDBG	EN	2013	B13MC060546		\$12,084.88	\$12,084.88
		2014	B14MC060546		\$49,281.12	\$49,281.12
Total	Total			\$61,366.00	\$61,366.00	\$61,366.00

# **Proposed Accomplishments**

Number assisted:	C	Owner		Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:					0	0			
Black/African American:					0	0			
Asian:					0	0			
American Indian/Alaskan Native:					0	0			
Native Hawaiian/Other Pacific Islander:					0	0			

Total:	0	0	0	0	0	0	0	0
Hispanic:					0	0		
Asian/Pacific Islander:					0	0		
Other multi-racial:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Black/African American & White:					0	0		
Asian White:					0	0		
American Indian/Alaskan Native & White:					0	0		

Female-headed Households:

Income Category:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

# **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

0

PGM Year: 2014

Project: 0002 - Fair Housing Services

IDIS Activity: 234 - Fair Housing Services

Status: Completed 6/30/2015 12:00:00 AM Objective: Location: Outcome:

Matrix Code: Fair Housing Activities (subject to 20% National Objective:

Initial Funding Date: 11/20/2014

#### **Description:**

This project provides fair housing education, counseling, and enforcement services to current or potential Newport Beach residents, coupled with landlordtenant counseling services.

These services impact and benefit target CDBG areas and the City's extremely-low to moderate income population.

They help counteract unlawful housing discrimination and assist CDBG target areas in reducing blight.

Fair Housing provides the opportunity for landlords and tenants to correct wrongful housing policies or behavior.

It is estimated that, in Newport Beach, this program will address 8 allegations of housing discrimination that result in the opening of a case file, and will address approximately 192

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$12,000.00	\$0.00	\$0.00
CDBG	EIN	2014	B14MC060546		\$12,000.00	\$12,000.00
Total	Total			\$12,000.00	\$12,000.00	\$12,000.00

# **Proposed Accomplishments**

# **Actual Accomplishments**

Number assisted:	0	wner	Rent	Renter		Total	Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		
Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		
Hispanic:					0	0		
Total:	0	0	0	0	0	0	0	0

Female-headed Households: 0

Income Category:

Catago.,.	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

No data returned for this view. This might be because the applied filter excludes all data.

PGM Year: 2014

**Project:** 0003 - Human Options: Community Resource Ctr. **IDIS Activity:** 235 - Human Options: Community Resource Ctr.

Status: Completed 6/30/2015 12:00:00 AM Objective: Create suitable living environments

Location: 5540 Trabuco Rd Irvine, CA 92620-5744 Outcome: Availability/accessibility

Matrix Code: Battered and Abused Spouses (05G) National Objective: LMC

Initial Funding Date: 11/20/2014

#### **Description:**

Human Options' Center for Children and Families offers a wide variety of counseling and psychoeducational programs to help victims and their family members heal from the effects of domestic violence.

The proposed services include crisis intervention, individual adult counseling, family counseling, support groups, personal empowerment program (PEP), children's individual counseling, parenting education groups, information and referrals, community education, intake to Human Options' Emergency Shelter and legal advocacy.

#### Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBC	EN	Pre-2015		\$5,243.54	\$0.00	\$0.00
CDBG	EIN	2014	B14MC060546		\$5,243.54	\$5,243.54
Total	Total			\$5,243.54	\$5,243.54	\$5,243.54

#### **Proposed Accomplishments**

People (General): 12

lumber assisted:	Owner		Renter		Total		Person	
Number assisted.	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	17	9
Black/African American:	0	0	0	0	0	0	1	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0

Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	18	9
Female-headed Households:	0		0		0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	4
Low Mod	0	0	0	13
Moderate	0	0	0	1
Non Low Moderate	0	0	0	0
Total	0	0	0	18
Percent Low/Mod				100.0%

# **Annual Accomplishments**

**Accomplishment Narrative** Years # Benefitting 2014

1st Qtr. the agency assisted 8 unduplicated clients and 4 persons were female head of households.

2nd Qtr. the agency assisted 3 unduplicated clients and the 3 persons were female head of households.

3rd Qtr. the agency assisted 6 unduplicated clients.

4th Qtr. the agency assisted 1 unduplicated client and 35 client contacts with prior clients.

During the F.Y. 2014-2015 18 unduplicated clients were assisted and total client contacts of 119. The Agency reached its goals.

**PGM Year:** 2014

0004 - Families Forward: Transitional Housing Program Project: **IDIS Activity:** 236 - Families Forward: Transitional Housing Program

Status: Completed 6/30/2015 12:00:00 AM Objective: Create suitable living environments

Location: 8 Thomas Irvine, CA 92618-2763 Outcome: Availability/accessibility

> Public Services (General) (05) Matrix Code: National Objective: LMC

**Initial Funding Date:** 11/20/2014

#### **Description:**

The Transitional Housing Program requires families to fully commit to making permanent changes in their lives that will result in achieving and maintaining self-sufficiency. The target population is homeless families and children.

The program provides case management and supportive services to households residing in Families Forward transitional housing units.

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$10,000.00	\$0.00	\$0.00
CDBG	EIN	2014	B14MC060546		\$10,000.00	\$10,000.00
Total	Total			\$10,000.00	\$10,000.00	\$10,000.00

# **Proposed Accomplishments**

People (General): 135

# **Actual Accomplishments**

lumber assisted:	0	wner	Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	107	39
Black/African American:	0	0	0	0	0	0	48	0
Asian:	0	0	0	0	0	0	11	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	3	2
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	21	10
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	190	51
Female-headed Households:	0		0		0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	174
Low Mod	0	0	0	13
Moderate	0	0	0	3
Non Low Moderate	0	0	0	0
Total	0	0	0	190
Percent Low/Mod				100.0%

# **Annual Accomplishments**

Years Accomplishment Narrative # Benefitting

2014 1st Qtr. the agency assisted 92 unduplicated persons and 17 persons were female head of households.

2nd Qtr. the agency assisted 38 unduplicated persons and 5 persons were female head of households. 3rd Qtr. the agency assisted 44 unduplicated persons and 5 persons were female head of households. 4th Qtr. the agency assisted 16 unduplicated persons and 2 persons were female head of households.

During the F.Y. 2014-2015 190 unduplicated were assisted and a total of 190 client contacts. A total of 29 persons were female head of

households. The agency met its goals.

PGM Year: 2014

**Project:** 0005 - Age Well Senior Serv.: Home Delivered Meals **IDIS Activity:** 237 - Age Well Senior Serv.: Home Delivered Meals

Status: Completed 6/30/2015 12:00:00 AM

Objective: Create suitable living environments

Location: 24300 El Toro Rd Ste 2000 Suite 2000 Laguna Woods, CA

92637-2777

Outcome: Availability/accessibility

Matrix Code: Senior Services (05A)

National Objective:

LMC

Initial Funding Date: 11/20/2014

# **Description:**

Age Well Senior Services will provide home-delivered meals to homebound senior citizens (62 or older) who are unable to prepare meals for themselves due to age, illness, or disability.

#### **Financing**

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$16,000.00	\$0.00	\$0.00
CDBG	EIN	2014	B14MC060546		\$16,000.00	\$16,000.00
Total	Total			\$16,000.00	\$16,000.00	\$16,000.00

#### **Proposed Accomplishments**

People (General): 130

Ni wakan anafatadi	Owner		Renter		l otal		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	105	0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0

Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	105	0
Female-headed Households:	0		0		0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	55
Low Mod	0	0	0	23
Moderate	0	0	0	16
Non Low Moderate	0	0	0	11
Total	0	0	0	105
Percent Low/Mod				89.5%

#### **Annual Accomplishments**

Years Accomplishment Narrative # Benefitting

1st Qtr. the agency assisted 74 unduplicated seniors and 30 seniors were female head of households. 2nd Qtr. the agency assisted 8 unduplicated seniors and 2 seniors were female head of households.

3rd Qtr. the agency assisted 13 unduplicated seniors and 5 seniors were female head of households.

4th Qtr. the agency assisted 10 unduplicated seniors and 43 seniors were female head of households.

During the F.Y. 2014-2015 a total of 105 seniors were assisted and a total of 34,317 meals were home-delivered.

PGM Year: 2014

0006 - SPIN: GAPP Housing Program 238 - SPIN: GAPP Housing Program

Status: Completed 6/30/2015 12:00:00 AM

Location: 151 Kalmus Dr H-2 S Costa Mesa, CA 92626-5988

Objective: Create suitable living environments

Outcome: Availability/accessibility

Matrix Code: Public Services (General) (05) National Objective:

LMC

Initial Funding Date: 11/20/2014

#### Description:

**Project:** 

**IDIS Activity:** 

The Guided Assistance to Permanent Placement Housing Program (GAPP) will provide access to appropriate housing to low-income and homeless families and individuals who are residents of Newport Beach, but who need assistance for various housing issues including move-in assistance, rent to prevent eviction and rapid re-housing.

SPIN will assist them with the costs of that housing need (paid to the provider, not the client) which is appropriate for their need, combine it with support services if appropriate and case management

# Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$14,000.00	\$0.00	\$0.00
CDBG	LIN	2014	B14MC060546		\$14,000.00	\$14,000.00
Total	Total			\$14,000.00	\$14,000.00	\$14,000.00

# **Proposed Accomplishments**

People (General): 10

# **Actual Accomplishments**

lumber assisted:	O	wner	Rent	ter	Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	14	2
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	1	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	15	2
Female-headed Households:	0		0		0			

# Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	11
Low Mod	0	0	0	4
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	15
Percent Low/Mod				100.0%

#### **Annual Accomplishments**

Years	Accomplishment Narrative	# Benefitting
2014	1st Qtr. the program assisted 1 unduplicated person. The person received case management services and budgetary assistance while securing a	
	job.	
	2nd Qtr. the program assisted 1 unduplicated person. The person received temporary rental assistance due to a medical crisis helping maintaining	
	her permanent housing.	
	3rd Qtr. the program assisted 2 unduplicated persons. Both persons received temporary rental assistance and case management assistance.	
	4th Qtr. the program assisted 11 unduplicated persons. The families received temporary rental assistance and case management assistance.	
	During the F.Y. 2014-2015 a total of 15 unduplicated persons were assisted comprising an overall of 10 households.	

2014 **PGM Year:** 

**Project:** 0007 - YES: Walk In Service for Youth Program 239 - YES: Walk In Service for Youth Program **IDIS Activity:** 

Completed 6/30/2015 12:00:00 AM Status:

Objective:

Create suitable living environments

Location: 114 E 19th St Costa Mesa, CA 92627-2807 Outcome:

Availability/accessibility

Matrix Code: Public Services (General) (05) National Objective:

LMC

Initial Funding Date:

11/20/2014

# **Description:**

The YES Walk In Service for Youth Program will provide effective employment related services to youth from low- and moderate-income households.

Program services are provided by professional staff who hold bachelor's degrees and have at least five (5) years of experience, as well as from trained volunteers.

Services include: A two hour employment skills class where youth learn important basic skills such as how to fill out job applications; A two hour personal finance and money management class; A mock interview experience.

#### Financing

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
CDBG	EN	Pre-2015		\$2,665.35	\$0.00	\$0.00
CDBG	EIN	2014	B14MC060546		\$2,665.35	\$2,665.35
Total	Total			\$2,665.35	\$2,665.35	\$2,665.35

#### **Proposed Accomplishments**

People (General): 25

Number assisted:	C	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	
White:	0	0	0	0	0	0	9	1	
Black/African American:	0	0	0	0	0	0	0	0	
Asian:	0	0	0	0	0	0	0	0	
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0	

Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	1	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	10	1

0

Female-headed Households:

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	6
Low Mod	0	0	0	2
Moderate	0	0	0	2
Non Low Moderate	0	0	0	0
Total	0	0	0	10
Percent Low/Mod				100.0%

# **Annual Accomplishments**

**Accomplishment Narrative** Years # Benefitting 2014

1st Qtr. the agency assisted 4 unduplicated youths and completing a total of 143 client contacts.

2nd Qtr. the agency didn't have any new applicants due to missing documentation, however, the existing youths had a total of 68 client contacts.

3rd Qtr. the agency assisted 1 unduplicated youth and completing a total of 39 client contacts. 4th Qtr. the agency assisted 5 unduplicated youths and completing a total of 75 client contacts.

During the F.Y. 2014-2015 a total of 10 unduplicated youths were assisted and a total of 325 client contacts.

**PGM Year:** 2014

Location:

0008 - Friends of OASIS - Monthly Social Gatherings Project: **IDIS Activity:** 240 - Friends of OASIS - Monthly Social Gatherings

Canceled 1/29/2015 12:22:18 PM Status:

801 Narcissus Ave Corona Del Mar, CA 92625-2433

Create suitable living environments Objective:

Outcome: Availability/accessibility

Senior Services (05A) Matrix Code: National Objective: LMC

0

**Initial Funding Date:** 11/20/2014

#### Description:

The Friends of OASIS will provide services to senior community and giving them the opportunity to live healthy, active and productive lives by providing socialization, good nutrition and will prevent isolation.

Oasis will invite from 50 to 100 senior residents of the Seaview affordable housing located in Corona del Mar to participate in their monthly gatherings.

Oasis will pay most of the costs from its general funds.

The funds requested will be used to provide transportation to and from the OASIS location for eleven months.

#### Financing

No data returned for this view. This might be because the applied filter excludes all data.

#### **Proposed Accomplishments**

People (General): 25

#### **Actual Accomplishments**

Alcondon a serial sele	0	wner	Rent	er	Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0		0
Black/African American:	0	0	0	0	0	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	0	0
Female-headed Households:	0		0		0			

#### Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	0
Low Mod	0	0	0	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	0

Percent Low/Mod

#### **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

PGM Year: 2014

Project: 0009 - Section 108 Loan Repayment

IDIS Activity: 241 - Section 108 Loan Repayment

Status: Completed 6/30/2015 12:00:00 AM

Location: ,

Matrix Code: Planned Repayment of Section 108

National Objective:

Initial Funding Date: 11/20/2014

Description:

Funds will be used to repay the City's Section 108 Loan.

The loan was used to partially fund public improvements to the Balboa Target Area totaling \$8 million.

The scope of work includes the Balboa Village Pedestrian and Streetscape Plan, Street Improvements to Balboa Blvd., Pier Parking Lot, and Pier Plaza and Lot A connecting access to Main Street.

Objective:

Outcome:

#### **Financing**

	Fund Type	Grant Year	Grant	Funded Amount	Drawn In Program Year	Drawn Thru Program Year
		Pre-2015		\$205,314.75	\$0.00	\$0.00
CDBG	EN	2013	B13MC060546		\$43,146.55	\$43,146.55
		2014	B14MC060546		\$162,168.20	\$162,168.20
Total	Total			\$205,314.75	\$205,314.75	\$205,314.75

#### **Proposed Accomplishments**

#### **Actual Accomplishments**

White: Black/African American: Asian: American Indian/Alaskan Native: Native Hawaiian/Other Pacific Islander: American Indian/Alaskan Native & White: Asian White: Black/African American & White: American Indian/Alaskan Native & Black/African American:	C	)wner	Renter		Total		Person	
Number assisted:	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:					0	0		
Black/African American:					0	0		
Asian:					0	0		
American Indian/Alaskan Native:					0	0		
Native Hawaiian/Other Pacific Islander:					0	0		
American Indian/Alaskan Native & White:					0	0		
Asian White:					0	0		
Black/African American & White:					0	0		
American Indian/Alaskan Native & Black/African American:					0	0		

Other multi-racial:					0	0		
Asian/Pacific Islander:					0	0		
Hispanic:					0	0		
Total:	0	0	0	0	0	0	0	0
Female-headed Households:					0			

Income Category:

	Owner	Renter	Total	Person
Extremely Low			0	
Low Mod			0	
Moderate			0	
Non Low Moderate			0	
Total	0	0	0	0
Percent Low/Mod				

#### **Annual Accomplishments**

No data returned for this view. This might be because the applied filter excludes all data.

Total Funded Amount:	\$3,814,743.06
Total Drawn Thru Program Year:	\$3,814,743.06
Total Drawn In Program Year:	\$326,589.64

PR03 - NEWPORT BEACH

### PR06 - Summary of Consolidated Plan Projects for Report Year

Page by:

Grantee: NEWPORT BEACH

Plan Year	IDIS Project	Project Title and Des	scription	Program	Project Estimate	Commited Amount	Amount Drawn Thru Report Year	Amount Available to Draw	Amount Drawn in Report Year
2014	1	CDBG Administration	This project provides for the overall administration of the CDBG Program, to include: preparation and submission of the Annual Action Plan and the CAPER, IDIS data input, provision of technical assistance, monitoring of all projects, and overall fiscal management. Funds will also be used to monitor existing affordable housing covenants.	CDBG	\$61,366.00	\$61,366.00	\$61,366.00	\$0.00	\$61,366.00
2014	2	Fair Housing Services	This project provides fair housing education, counseling, and enforcement services to current or potential Newport Beach residents, coupled with landlord/tenant counseling services. These services impact and benefit target CDBG areas and the City's extremely-low to moderate income population. They help counteract unlawful housing discrimination and assist CDBG target areas in reducing blight. Fair Housing provides the opportunity for landlords and tenants to correct wrongful housing policies or behavior. It is estimated that, in Newport Beach, this program will address 8 allegations of housing discrimination that result in the opening of a case file, and will address approximately 192 landlord/tenant disputes, totaling 200 households issues or concerns.		\$12,000.00	\$12,000.00	\$12,000.00	\$0.00	\$12,000.00

Plan Year	IDIS Project	Project Title and De	scription	Program	Project Estimate	Commited Amount	Amount Drawn Thru Report Year	Available to Draw	Amount Drawn in Report Year
2014	3	Human Options: Community Resource Ctr.	Human Options' Center for Children and Families offers a wide variety of counseling and psycho educational programs to help victims and their family members heal from the effects of domestic violence. The proposed services include crisis intervention, individual adult counseling, family counseling, support groups, personal empowerment program (PEP), children's individual counseling, parenting education groups, information and referrals, community education, intake to Human Options' Emergency Shelter and legal advocacy.	CDBG	\$6,500.00	\$5,243.54	\$5,243.54	\$0.00	\$5,243.54
2014	4	Families Forward: Transitional Housing Program	The Transitional Housing Program requires families to fully commit to making permanent changes in their lives that will result in achieving and maintaining self-sufficiency. The target population is homeless families and children. The program provides case management and supportive services to households residing in Families Forward transitional housing units.	CDBG	\$10,000.00	\$10,000.00	\$10,000.00	\$0.00	\$10,000.00
2014	5	Age Well Senior Serv.: Home Delivered Meals	Age Well Senior Services will provide homedelivered meals to homebound senior citizens (62 or older) who are unable to prepare meals for themselves due to age, illness, or disability.	CDBG	\$16,000.00	\$16,000.00	\$16,000.00	\$0.00	\$16,000.00

Plan Year	IDIS Project	Project Title and De	scription	Program	Project Estimate	Commited Amount	Amount Drawn Thru Report Year	Amount Available to Draw	Amount Drawn in Report Year
2014	6	SPIN: GAPP Housing Program	The Guided Assistance to Permanent Placement Housing Program (GAPP) will provide access to appropriate housing to low-income and homeless families and individuals who are residents of Newport Beach, but who need assistance for various housing issues including move-in assistance, rent to prevent eviction and rapid re-houising. SPIN will assist them with the costs of that housing need (paid to the provider, not the client) which is appropriate for their need, combine it with support services if appropriate and case management.	CDBG	\$14,000.00	\$14,000.00	\$14,000.00	\$0.00	\$14,000.00
2014	7	YES: Walk In Service for Youth Program	The YES Walk In Service for Youth Program will provide effective employment related services to youth from low- and moderate-income households. Program services are provided by professional staff who hold bachelor's degrees and have at least five (5) years of experience, as well as from trained volunteers. Services include: A two hour employment skills class where youth learn important basic skills such as how to fill out job applications; A two hour personal finance and money management		\$5,000.00	\$2,665.35	\$2,665.35	\$0.00	\$2,665.35

class; A mock interview experience. Upon completion of these program components, each youth receives up to three (3) job referrals upon

each visit to YES.

Plan Year	IDIS Project	Project Title and Des	scription	Program	Project Estimate	Commited Amount	Amount Drawn Thru Report Year	Available to Draw	Amount Drawn in Report Year
2014	8	Friends of OASIS - Monthly Social Gatherings	The Friends of OASIS will provide services to senior community and giving them the opportunity to live healthy, active and productive lives by providing socialization, good nutrition and will prevent isolation. Oasis will invite from 50 to 100 senior residents of the Seaview affordable housing located in Corona del Mar to participate in their monthly gatherings. Oasis will pay most of the costs from its general funds. The funds requested will be used to provide transportation to and from the OASIS location for eleven months.		\$3,500.00	\$0.00	\$0.00	\$0.00	\$0.00
2014	9	Section 108 Loan Repayment	Funds will be used to repay the City's Section 108 Loan. The loan was used to partially fund public improvements to the Balboa Target Area totaling \$8 million. The scope of work includes the Balboa Village Pedestrian and Streetscape Plan, Street Improvements to Balboa Blvd., Pier Parking Lot, and Pier Plaza and Lot A connecting access to Main Street.	CDBG	\$205,315.00	\$205,314.75	\$205,314.75	\$0.00	\$205,314.75



#### U.S. Department of Housing and Urban Development Office of Community Planning and Development Integrated Disbursement and Information System CDBG Summary of Accomplishments

Program Year: 2014

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#### NEWPORT BEACH

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

Activity Croup	Activity Catagory		Open Activities	Completed	Completed Activities	Drogram Voor	Total Activities
Activity Group	Activity Category	Open Count	Disbursed	Completed	Disbursed	Count	Total Activities Disbursed
Public Facilities and Improvement	s Public Facilities and Improvement (General) (03)	1	\$0.00	0	\$0.00	1	\$0.00
	Total Public Facilities and Improvements	1	\$0.00	0	\$0.00	1	\$0.00
Public Services	Public Services (General) (05)	0	\$0.00	6	\$26,665.35	6	\$26,665.35
	Senior Services (05A)	0	\$0.00	2	\$16,000.00	2	\$16,000.00
	Battered and Abused Spouses (05G)	0	\$0.00	2	\$5,243.54	2	\$5,243.54
	Total Public Services	0	\$0.00	10	\$47,908.89	10	\$47,908.89
General Administration and	General Program Administration (21A)	0	\$0.00	2	\$61,366.00	2	\$61,366.00
Planning	Fair Housing Activities (subject to 20% Admin Cap) (21D)	0	\$0.00	2	\$12,000.00	2	\$12,000.00
	Total General Administration and Planning	0	\$0.00	4	\$73,366.00	4	\$73,366.00
Repayment of Section 108 Loans	Planned Repayment of Section 108 Loan Principal (19F)	0	\$0.00	2	\$205,314.75	2	\$205,314.75
	Total Repayment of Section 108 Loans	0	\$0.00	2	\$205,314.75	2	\$205,314.75
Grand Total		1	\$0.00	16	\$326,589.64	17	\$326,589.64



#### U.S. Department of Housing and Urban Development Office of Community Planning and Development Integrated Disbursement and Information System CDBG Summary of Accomplishments

Program Year: 2014

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#### NEWPORT BEACH

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

Activity Group	Matrix Code	Accomplishment Type		Program Year
Activity Group	Wati ix code	Accomplishment Type	Open Count Completed Cour	nt Totals
Public Services	Public Services (General) (05)	Persons	0 40	7 407
	Senior Services (05A)	Persons	0 22	4 224
	Battered and Abused Spouses (05G)	Persons	0	4 34
	Total Public Services		0 66	5 665
Grand Total			0 66	5 665



# U.S. Department of Housing and Urban Development Office of Community Planning and Development Integrated Disbursement and Information System CDBG Summary of Accomplishments

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Program Year: 2014

#### NEWPORT BEACH

#### CDBG Beneficiaries by Racial / Ethnic Category

Housing-Non Housing	Race		Total Hispanic		
		Total Persons	Persons	Total Households	Households
Non Housing	White	517	117	0	0
	Black/African American	72	0	0	0
	Asian	24	0	0	0
	Native Hawaiian/Other Pacific Islander	3	0	0	0
	American Indian/Alaskan Native & White	6	2	0	0
	Asian & White	1	0	0	0
	Other multi-racial	42	15	0	0
	Total Non Housing	665	134	0	0
Grand Total	White	517	117	0	0
	Black/African American	72	0	0	0
	Asian	24	0	0	0
	Native Hawaiian/Other Pacific Islander	3	0	0	0
	American Indian/Alaskan Native & White	6	2	0	0
	Asian & White	1	0	0	0
	Other multi-racial	42	15	0	0
	Total Grand Total	665	134	0	0



#### U.S. Department of Housing and Urban Development Office of Community Planning and Development Integrated Disbursement and Information System CDBG Summary of Accomplishments Program Year: 2014

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#### NEWPORT BEACH

#### CDBG Beneficiaries by Income Category

	Income Levels	Owner Occupied	Renter Occupied	Persons
Non Housing	Extremely Low (<=30%)	0	0	250
	Low (>30% and <=50%)	0	0	55
	Mod (>50% and <=80%)	0	0	22
	Total Low-Mod	0	0	327
	Non Low-Mod (>80%)	0	0	11
	Total Beneficiaries	0	0	338



#### Office of Community Planning and Development U.S. Department of Housing and Urban Development Integrated Disbursement and Information System

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#### PR26 - CDBG Financial Summary Report Program Year 2014

NEWPORT BEACH , CA

PART I: SUMMARY OF CDBG RESOURCES	
01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	55,231.43
02 ENTITLEMENT GRANT	366,830.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	0.00 0.00
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)  06 RETURNS	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	422,061.43
PART II: SUMMARY OF CDBG EXPENDITURES	422,001.43
09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	47,908.89
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	47,908.89
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	73,366.00
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	205,314.75
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	326,589.64
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	95,471.79
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	47,908.89
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	47,908.89
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%
LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS	DV DV DV
23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: PY: PY:
24 CUMULATIVE 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)  DART LV: DURL LC SERVICE (DS) CAR CALCUL ATIONS	0.00%
PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS	
27 DISPUIDSED IN IDIS EOD DUDLIC SEDVICES	47 000 00
27 DISBURSED IN IDIS FOR PUBLIC SERVICES 28 DS LINI IOLIDATED OBLICATIONS AT END OF CURPENT PROGRAM YEAR	47,908.89
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00 0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00 0.00 0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	0.00 0.00 0.00 47,908.89
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00 0.00 0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT	0.00 0.00 0.00 47,908.89 366,830.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT 33 PRIOR YEAR PROGRAM INCOME	0.00 0.00 0.00 47,908.89 366,830.00 0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT 33 PRIOR YEAR PROGRAM INCOME 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00 0.00 0.00 47,908.89 366,830.00 0.00
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)  PRIOR YEAR PROGRAM INCOME ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR  PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR  ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS  TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)  PRIOR YEAR PROGRAM INCOME  ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP  TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)  PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT 33 PRIOR YEAR PROGRAM INCOME 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP 35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) 36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06%
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR  PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR  ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS  TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)  PRIOR YEAR PROGRAM INCOME  ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP  TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)  PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)  PART V: PLANNING AND ADMINISTRATION (PA) CAP	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06%
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT 33 PRIOR YEAR PROGRAM INCOME 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP 35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) 36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP 37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION 38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT 33 PRIOR YEAR PROGRAM INCOME 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP 35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) 36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP 37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION 38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00 0.00
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)  PRIOR YEAR PROGRAM INCOME ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 + LINE 40)  ENTITLEMENT GRANT	0.00 0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00 0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) 32 ENTITLEMENT GRANT 33 PRIOR YEAR PROGRAM INCOME 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP 35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) 36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP 37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION 38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR 39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR 40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS 41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40) 42 ENTITLEMENT GRANT 43 CURRENT YEAR PROGRAM INCOME	0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00 0.00 0.00 73,366.00
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) ENTITLEMENT GRANT PRIOR YEAR PROGRAM INCOME ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 + LINE 40) ENTITLEMENT GRANT CURRENT YEAR PROGRAM INCOME	0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00 0.00 0.00 73,366.00 366,830.00 0.00 0.00
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR  PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR  ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS  TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)  ENTITLEMENT GRANT  PRIOR YEAR PROGRAM INCOME  ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP  TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)  PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)  PART V: PLANNING AND ADMINISTRATION (PA) CAP  DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION  PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR  PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR  ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS  TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)  ENTITLEMENT GRANT  CURRENT YEAR PROGRAM INCOME  ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP  TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00 0.00 73,366.00 366,830.00 0.00 0.00 366,830.00 0.00 366,830.00
PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) ENTITLEMENT GRANT PRIOR YEAR PROGRAM INCOME ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) PART V: PLANNING AND ADMINISTRATION (PA) CAP DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 + LINE 40) ENTITLEMENT GRANT CURRENT YEAR PROGRAM INCOME	0.00 0.00 47,908.89 366,830.00 0.00 0.00 366,830.00 13.06% 73,366.00 0.00 0.00 0.00 73,366.00 366,830.00 0.00 0.00



# Office of Community Planning and Development U.S. Department of Housing and Urban Development Integrated Disbursement and Information System

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PR26 - CDBG Financial Summary Report

Program Year 2014 NEWPORT BEACH, CA

LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17 Report returned no data.

LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18 Report returned no data.

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	4	236	5773023	Families Forward: Transitional Housing Program	05	LMC	\$2,543.81
2014	4	236	5791074	Families Forward: Transitional Housing Program	05	LMC	\$7,456.19
2014	6	238	5773023	SPIN: GAPP Housing Program	05	LMC	\$1,506.02
2014	6	238	5791074	SPIN: GAPP Housing Program	05	LMC	\$548.10
2014	6	238	5814104	SPIN: GAPP Housing Program	05	LMC	\$3,389.68
2014	6	238	5843771	SPIN: GAPP Housing Program	05	LMC	\$8,556.20
2014	7	239	5773023	YES: Walk In Service for Youth Program	05	LMC	\$1,823.73
2014	7	239	5791074	YES: Walk In Service for Youth Program	05	LMC	\$841.62
					05	Matrix Code	\$26,665.35
2014	5	237	5773023	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$6,450.15
2014	5	237	5791074	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$5,285.43
2014	5	237	5814104	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$3,669.25
2014	5	237	5843771	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$595.17
					05A	Matrix Code	\$16,000.00
2014	3	235	5773023	Human Options: Community Resource Ctr.	05G	LMC	\$1,456.18
2014	3	235	5791074	Human Options: Community Resource Ctr.	05G	LMC	\$928.44
2014	3	235	5814104	Human Options: Community Resource Ctr.	05G	LMC	\$1,380.51
2014	3	235	5843771	Human Options: Community Resource Ctr.	05G	LMC	\$1,478.41
					05G	Matrix Code	\$5,243.54
Total						_	\$47,908.89

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	4	236	5773023	Families Forward: Transitional Housing Program	05	LMC	\$2,543.81
2014	4	236	5791074	Families Forward: Transitional Housing Program	05	LMC	\$7,456.19
2014	6	238	5773023	SPIN: GAPP Housing Program	05	LMC	\$1,506.02
2014	6	238	5791074	SPIN: GAPP Housing Program	05	LMC	\$548.10
2014	6	238	5814104	SPIN: GAPP Housing Program	05	LMC	\$3,389.68
2014	6	238	5843771	SPIN: GAPP Housing Program	05	LMC	\$8,556.20
2014	7	239	5773023	YES: Walk In Service for Youth Program	05	LMC	\$1,823.73
2014	7	239	5791074	YES: Walk In Service for Youth Program	05	LMC	\$841.62
					05	Matrix Code	\$26,665.35
2014	5	237	5773023	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$6,450.15
2014	5	237	5791074	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$5,285.43
2014	5	237	5814104	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$3,669.25
2014	5	237	5843771	Age Well Senior Serv.: Home Delivered Meals	05A	LMC	\$595.17
					05A	Matrix Code	\$16,000.00
2014	3	235	5773023	Human Options: Community Resource Ctr.	05G	LMC	\$1,456.18
2014	3	235	5791074	Human Options: Community Resource Ctr.	05G	LMC	\$928.44
2014	3	235	5814104	Human Options: Community Resource Ctr.	05G	LMC	\$1,380.51
2014	3	235	5843771	Human Options: Community Resource Ctr.	05G	LMC	\$1,478.41
					05G	Matrix Code	\$5,243.54
Total						_	\$47,908.89



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PR26 - CDBG Financial Summary Report

Program Year 2014

## NEWPORT BEACH , CA LINE 37 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 37

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	1	233	5765286	CDBG Administration	21A		\$12,084.88
2014	1	233	5773023	CDBG Administration	21A		\$5,022.50
2014	1	233	5791074	CDBG Administration	21A		\$5,766.38
2014	1	233	5814104	CDBG Administration	21A		\$5,347.50
2014	1	233	5843771	CDBG Administration	21A		\$33,144.74
					21A	Matrix Code	\$61,366.00
2014	2	234	5773023	Fair Housing Services	21D		\$2,844.75
2014	2	234	5791074	Fair Housing Services	21D		\$2,945.79
2014	2	234	5814104	Fair Housing Services	21D		\$3,093.14
2014	2	234	5843771	Fair Housing Services	21D		\$3,116.32
				-	21D	Matrix Code	\$12,000.00
Total						_	\$73,366.00

#### Section 3 Summary Report

Economic Opportunities for Low – and Very Low-Income Persons U.S. Department of Housing and Urban Development Office of Fair Housing And Equal Opportunity

OMB Approval No: 2529-0043 (exp. 11/30/2010)

HUD Field Office Los Angeles

Section back of page for Public Reporting Burden statement

Recipient Name & Address: (street, city, state, zip)	2. Fede	ral Identification: (grant	no.) B-14-MC-06-0546	Total Amount of Award:     \$3	366,830.00
City of Newport Beach 330 Newport Blvd.		act Person Clint Whi	ted, CDBG Consultant	5. Phone: (Include area code)	(909) 476-6006 x115
Newport Beach, CA 92663	6. Lengt	th of Grant: 12 Month	ns	7. Reporting Period: 07/01/2	2014 - 06/30/2015
8. Date Report Submitted: 09/22/2015	9. Progr	ram Code: (Use sepa for each	arate sheet program code) 7	10. Program Name: CDBG	- Entitlement
Part I: Employment and Training (** Colu			tory fields. Include New Hi		
	B umber of ew Hires	C Number of New Hires that are Sec. 3 Residents	D % of Aggregate Number of Staff Hours of New Hires that are Sec. 3 Residents	E % of Total Staff Hours for Section 3 Employees and Trainees	F Number of Section 3 Trainees
Professionals	0	0	0	0	0
Technicians	0	0	0	0	0
Office/Clerical	0	0	0	0	0
Construction by Trade (List) Trade	0	0	0	0	0
Trade	0	0	0	0	0
Trade	0	0	0	0	0
Trade	0	0	0	0	0
Trade	0	0	0	0	0
Other (List)	0	0	0	0	0
		-			
Total	0	0	0	0	0

<sup>3 =</sup> Public/Indian Housing

A = Development, B = Operation C = Modernization

<sup>4 =</sup> Homeless Assistance

<sup>5 =</sup> HOME 6 = HOME State Administered 7 = CDBG Entitlement

#### Part II: Contracts Awarded

1. Construction Contracts:			
A. Total dollar amount of all contracts awarded on the project	\$ 0.00		
B. Total dollar amount of contracts awarded to Section 3 businesses	\$0.00		
C. Percentage of the total dollar amount that was awarded to Section 3 businesses	0		%
D. Total number of Section 3 businesses receiving contracts		0	
Non-Construction Contracts:     A. Total dollar amount all non-construction contracts awarded on the project/activity	\$ 0		
B. Total dollar amount of non-construction contracts awarded to Section 3 businesses	\$ 0		
C. Percentage of the total dollar amount that was awarded to Section 3 businesses	0		%
D. Total number of Section 3 husinesses receiving non-construction contracts	0		

#### Part III: Summary

Indicate	the efforts made to direct the employment and other economic opportunities generated by HUD financial assistance for housing
and con	nmunity development programs, to the greatest extent feasible, toward low-and very low-income persons, particularly those who
are recip	pients of government assistance for housing. (Check all that apply.)
/	Attempted to recruit low-income residents through: local advertising media, signs prominently displayed at the project site,
(	contracts with the community organizations and public or private agencies operating within the metropolitan area (or
1	nonmetropolitan county) in which the Section 3 covered program or project is located, or similar methods.
	Participated in a HUD program or other program which promotes the training or employment of Section 3 residents.
	Participated in a HUD program or other program which promotes the award of contracts to business concerns which meet the
(	definition of Section 3 business concerns.
(	Coordinated with Youthbuild Programs administered in the metropolitan area in which the Section 3 covered project is located.
X (	Other; describe below.

The City did not award any contracts that were Section 3 Covered (project assisted with \$200,000 or more) during this fiscal year.

Public reporting for this collection of information is estimated to average 2 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB number.

Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u, mandates that the Department ensures that employment and other economic opportunities generated by its housing and community development assistance programs are directed toward low- and very-low income persons, particularly those who are recipients of government assistance housing. The regulations are found at 24 CFR Part 135. The information will be used by the Department to monitor program recipients' compliance with Section 3, to assess the results of the Department's efforts to meet the statutory objectives of Section 3, to prepare reports to Congress, and by recipients as self-monitoring tool. The data is entered into a database and will be analyzed and distributed. The collection of information involves recipients receiving Federal financial assistance for housing and community development programs covered by Section 3. The information will be collected annually to assist HUD in meeting its reporting requirements under Section 808(e)(6) of the Fair Housing Act and Section 916 of the HCDA of 1992. An assurance of confidentiality is not applicable to this form. The Privacy Act of 1974 and OMB Circular A-108 are not applicable. The reporting requirements do not contain sensitive questions. Data is cumulative; personal identifying information is not included.

#### Form HUD-60002, Section 3 Summary Report, Economic Opportunities for Low- and Very Low-Income Persons.

Instructions: This form is to be used to report annual accomplishments regarding employment and other economic opportunities provided to low- and very low-income persons under Section 3 of the Housing and Urban Development Act of 1968. The Section 3 regulations apply to any public and Indian housing programs that receive: (1) development assistance pursuant to Section 5 of the U.S. Housing Act of 1937; (2) operating assistance pursuant to Section 9 of the U.S. Housing Act of 1937; or (3) modernization grants pursuant to Section 14 of the U.S. Housing Act of 1937 and to recipients of housing and community development assistance in excess of \$200,000 expended for: (1) housing rehabilitation (including reduction and abatement of lead-based paint hazards); (2) housing construction; or (3) other public construction projects; and to contracts and subcontracts in excess of \$100,000 awarded in connection with the Section-3-covered activity.

Form HUD-60002 has three parts, which are to be completed for all programs covered by Section 3. Part I relates to employment and training. The recipient has the option to determine numerical employment/training goals either on the basis of the number of hours worked by new hires (columns B, D, E and F). Part II of the form relates to contracting, and Part III summarizes recipients' efforts to comply with Section 3.

Recipients or contractors subject to Section 3 requirements must maintain appropriate documentation to establish that HUD financial assistance for housing and community development programs were directed toward low- and very low-income persons.\* A recipient of Section 3 covered assistance shall submit one copy of this report to HUD Headquarters, Office of Fair Housing and Equal Opportunity. Where the program providing assistance requires an annual performance report, this Section 3 report is to be submitted at the same time the program performance report is submitted. Where an annual performance report is not required, this Section 3 report is to be submitted by January 10 and, if the project ends before December 31, within 10 days of project completion. *Only Prime Recipients are* required to report to HUD. The report must include accomplishments of all recipients and their Section 3 covered contractors and subcontractors.

HUD Field Office: Enter the Field Office name.

- Recipient: Enter the name and address of the recipient submitting this report.
- 2. Federal Identification: Enter the number that appears on the award form (with dashes). The award may be a grant, cooperative agreement or contract.
- 3. Dollar Amount of Award: Enter the dollar amount, rounded to the nearest dollar, received by the recipient.
- 4 & 5. Contact Person/Phone: Enter the name and telephone number of the person with knowledge of the award and the recipient's implementation of Section 3.
- Reporting Period: Indicate the time period (months and year) this report covers
- Date Report Submitted: Enter the appropriate date.

- Program Code: Enter the appropriate program code as listed at the bottom of the page.
- Program Name: Enter the name of HUD Program corresponding with the "Program Code" in number 8.

#### Part I: Employment and Training Opportunities

Column A: Contains various job categories. Professionals are defined as people who have special knowledge of an occupation (i.e. supervisors, architects, surveyors, planners, and computer programmers). For construction positions, list each trade and provide data in columns B through F for each trade where persons were employed. The category of "Other" includes occupations such as service workers.

Column B: (Mandatory Field) Enter the number of new hires for each category of workers identified in  ${\bf Column}~{\bf A}$  in connection with this award. New hire refers to a person who is not on the contractor's or recipient's payroll for employment at the time of selection for the Section 3 covered award or at the time of receipt of Section 3 covered

Column C: (Mandatory Field) Enter the number of Section 3 new hires for each category of workers identified in Column A in connection with this award. Section 3 new hire refers to a Section 3 resident who is not on the contractor's or recipient's payroll for employment at the time of selection for the Section 3 covered award or at the time of receipt of Section 3 covered assistance.

Column D: Enter the percentage of all the staff hours of new hires (Section 3 residents) in connection with this award.

Column E: Enter the percentage of the total staff hours worked for Section 3 employees and trainees (including new hires) connected with this award. Include staff hours for part-time and full-time positions

Column F: (Mandatory Field) Enter the number of Section 3 residents that were trained in connection with this award. Part II: Contract Opportunities

**Block 1:** Construction Contracts

Item A: Enter the total dollar amount of all contracts awarded on the project/program.

Item B: Enter the total dollar amount of contracts connected with this project/program that were awarded to Section 3 businesses.

Item C: Enter the percentage of the total dollar amount of contracts connected with this project/program awarded to Section 3 businesses. Item D: Enter the number of Section 3 businesses receiving awards. **Block 2:** Non-Construction Contracts

Item A: Enter the total dollar amount of all contracts awarded on the project/program.

Item B: Enter the total dollar amount of contracts connected with this project awarded to Section 3 businesses.

Item C: Enter the percentage of the total dollar amount of contracts connected with this project/program awarded to Section 3 businesses.

Item D: Enter the number of Section 3 businesses receiving awards.

Part III: Summary of Efforts - Self -explanatory

Submit one (1) copy of this report to the HUD Headquarters Office of Fair Housing and Equal Opportunity, at the same time the performance report is submitted to the program office. The Section 3 report is submitted by January 10. Include only contracts executed during the period specified in item 8. PHAs/IHAs are to report all contracts/subcontracts.

\* The terms "low-income persons" and very low-income persons" have the same meanings given the terms in section 3 (b) (2) of the United States Housing Act of 1937. Low-income persons mean families (including single persons) whose incomes do not exceed 80 percent of the median income for the area, as determined by the Secretary, with adjustments for smaller and larger families, except that

The Secretary may establish income ceilings higher or lower than 80 percent of the median for the area on the basis of the Secretary's findings such that variations are necessary because of prevailing levels of construction costs or unusually high- or low-income families. Very low-income persons mean low-income families (including single persons) whose incomes do not exceed 50 percent of the median family income area, as determined by the Secretary with adjustments or smaller and larger families, except that the Secretary may establish income ceilings higher or lower than 50 percent of the median for the area on the basis of the Secretary's findings that such variations are necessary because of unusually high or low family incomes.



# APPENDIX "F" CHECKLIST

#### APPENDIX "F": COMPLIANCE CHECKLIST

The City's Consolidated Annual Performance Evaluation Report (CAPER) must comply with several federal regulations. This appendix is designed to aid the City's representative document that the report is in full compliance with the regulations.

THE SUBMISSION	
Was the statutory	submission deadline met?
Yes 🗌	*No 🗌
Was the Financia	l Summary (IDIS Report number C04PR26) provided?
Yes	No  - grantee notified, summary received
Did the report co	ver the appropriate program year?
Yes	No  - grantee notified, correct report received
Does the report is	dentify CPD entitlement funds?
Yes	*No 🗌
Does the report is	dentify all known Federal/HUD resources available to the grantee (including SNAPs)?
Yes	*No 🗌
* Correct information not	ed and/or requested in PYR letter.
NARRATIVES - GE	NERAL
Does the <u>Three/F</u> objectives?	Five Year Goals and Objectives assessment relate back to Strategic Consolidated Plan
Yes 🗌	*No 🗌
Does the report a	address High Priority Needs?
Yes	*No 🗌
	ble Housing Evaluation include the number of extremely low, low, and moderate-income households assisted during the reporting period?
Yes	*No 🗌
	ble Housing Evaluation include the number of households assisted with housing that n 215 definition of affordable housing for rental and home ownership?
Yes	*No 🗌
income household or inc	Housing. 1. Rental Housing: A rental housing unit is considered to be an affordable housing unit if it is occupied by a low- lividual and bears a rent that is the lesser of a) the existing section 8 fair market rent for comparable units in the area or b) 30 income of a household whose income equals 65 percent of the median income for the area, except that HUD may establish

income ceilings higher or lower than 65 percent of the median because of prevailing level of construction costs or fair market rents, or unusually high or low family incomes. 2. Homeownership: a) housing that is for purchase, with or without rehab., qualifies as affordable housing if it 1) is purchased by a low income first time homebuyer who will make the housing his or her principal residence and 2) has a sale price which does not exceed the mortgage limit for the type of single family housing for the area under HUD's single family insuring authority under the National Housing Act. b) housing that is to be rehabilitated, but is already owned by a household when assistance is provided, qualifies as affordable if the housing 1) is occupied by a low income household which uses the housing as its principal residence, and 2) has a value, after rehabilitation, that does not exceed the mortgage limit for the type of single family housing for the area as described in 2a) above.

Note: these definitions apply for the purposes of enumerating the number of households assisted with housing meeting the 215 affordable housing definition regardless of the Federal funding source used in support of that housing.

Was there a comp	parison of actual accomplishments with proposed goals for the reporting period?
Yes	*No 🗆
Were there efforts	s to address worse case needs?
Yes	*No 🗌
Were there efforts	s to address the needs of persons with disabilities?
Yes	*No 🗆
CONTINUUM OF CA	RE STRATEGY
	identify actions taken at all points along the continuum from prevention and outreach cy, transitional, and permanent housing?
Yes	*No 🗆
Other Actions add	dressed, include:
Actions taken to a	address obstacles to meeting underserved needs;
Yes	*No 🗌
Fostering and ma	intaining affordable housing;
Yes	*No 🗌
Eliminating barrie	rs to affordable housing;
Yes	*No 🗆
Overcoming gaps	in institutional structures and enhancing coordination;
Yes	*No 🗌
Improving public I	nousing and resident initiatives;
Yes	*No
Evaluating and re	ducing lead based paint hazards;
Yes	*No 🗆
Ensuring complia	nce with program and comprehensive planning requirements; and
Yes	*No 🗆

Reducing the number of persons living below the poverty level.			
Yes	*No		
	on include a description of the <u>Leveraging</u> of other public and private resources as lan, including how any matching requirements were satisfied?		
Yes	*No 🗌		
Was a <u>Summary</u>	of Citizen Comments included in the submission?		
Yes	*No 🗌		
Did the report inc	lude a <u>Self-evaluation</u> ?		
Yes	*No 🗌		
Affirmatively Furth	hering Fair Housing evaluated by FHEO Division, all grantees. No review undertaken.		
*Correct information note	ed and/or requested in PYR letter.		
CDBG ENTITLEME	ENT NARRATIVES		
	on include an <u>Assessment of the Relationship of CDBG Funds</u> to the high priority in the plan, including an evaluation of the extent to which CDBG funds were used to ns?		
Yes	*No 🗌		
Did Narratives als	so include:		
An explanation of the nature of and reasons for any changes in program objectives, and an indication of how the jurisdiction would change its program as a result of its experience?			
Yes	*No 🗌		
An evaluation of t	the extent to which CDBG funds were used to benefit LMI persons?		
Yes	*No 🗌		
Assessment of Efforts Made in Carrying Out Planned Actions described in the Consolidated Plan includes a narrative or other information which indicates that:			
The grantee pursued all resources indicated in the Consolidated Plan.			
Yes	*No 🗌		
Certifications for consistency were provided for other HUD programs.			
Yes	*No		
The grantee did not hinder plan implementation by action or willful inaction.			
Yes	*No 🗆		

Did the grantee indicate that it has carried out activities that involved acquisition, rehabilitation or demolition of occupied property triggering the <u>Uniform Relocation Act</u> ?				
*Yes	**No 🗌	N/A (no activities)		
*Yes: The grante	e submitted	narratives which identify:		
The steps taken t	o minimize	the amount of displacement resulting from the CDBG-assisted activities.		
Yes	**No 🗌	N/A (no activities)		
		cholds, businesses, farms or nonprofit organizations who occupied properties whether or not they were displaced, and; the nature of their needs and		
Yes	**No 🗌	N/A (no activities)		
Steps taken to en	dure the tin	nely issuance of information notices.		
Yes	**No 🗌	N/A (no activities)		
Did the grantee c	arry out <u>Ecc</u>	onomic Development Activities during the reporting period?		
*Yes	No 🗌			
*Yes: Job Creation	n/Retentior	1		
Economic develo	pment jobs	as applicable were made available to low- or moderate-income persons.		
Yes	*No 🗌	N/A (job creation/retention objective not employed)		
A narrative of actions taken by the grantees and the businesses to ensure first consideration was or will be given to low/mod persons has been provided.				
Yes	**No 🗌	N/A (job creation/retention objective not employed)		
A listing by job title of all permanent jobs created/retained and those that were made available to low/mod persons has been provided.				
Yes	**No 🗌	N/A (job creation/retention objective not employed)		
Were jobs claime education?	d as being a	available to low/mod persons that require special skills, work experience, or		
*Yes	No 🗌	N/A 🗌		
Did the grantee in requirement?	nclude a des	scription of the steps being taken or that will be taken to meet this		
Yes 🗌	**No 🗌	N/A 🗌		
Did the grantee u		ctivities that serve <u>Limited Clientele</u> not falling within one of the categories of w/mod benefit?		

*Yes **No ***Can't Tell				
*Yes: the grantee provided a narrative description explaining how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of who are low- and moderate-income.				
Yes ☐ **No ☐				
Did the grantee undertake activities during the program year which generated <u>Program Income</u> to revolving funds; from float funded activities; from the sale of real property; other loan repayments; prior period adjustments; loans outstanding or written off; parcels of CDBG-acquired property available for sale; or lump sum drawdown payments?				
*Yes  No  **Can't Tell				
*Yes: narrative information provided:				
a) the amount of program income which was returned to each revolving fund; b) the amount repaid on each float funded activity; c) all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other; and d) the amount of income received from the sale of property by parcel.				
Yes (A ☐ B ☐ C ☐ D ☐) **No (A ☐ B ☐ C ☐ D ☐)				
<u>Prior Period Adjustments</u> : were reimbursements made this reporting period for expenditures that have been disallowed?				
*Yes				
*Yes: the grantee included narrative information that includes: a) the activity name and number as shown in IDIS; b) the amount returned to the line of credit or program account; and c) if the reimbursement is to be made over multi-year payments, the total amount to be reimbursed and the time period over which the reimbursement is to be made.				
Yes (A ☐ B ☐ C☐ ) **No (A ☐ B ☐ C☐ )				
Loans and Other Receivables				
*Yes				
Yes: The narrative for Loans and Other Receivables identified: a) Float Funded activities outstanding as of the end of the reporting period; b) the total amount of loans outstanding and the principal balance owed as of the end of the reporting period; c) parcels acquired or improved with CDBG funds that are available for sale as of the end of the reporting period; and d) the number and amount of loans in default for which the balance was forgiven or written off during the reporting period.				
Yes (A ☐ B ☐ C ☐ D ☐ ) **No (A ☐ B ☐ C ☐ D ☐)				
Lump Sum Agreements				
*Yes				
*Yes: Information regarding a) the name of the financial institution; b) date the funds were deposited; c) date the use of funds commenced; and d) the percentage of funds disbursed within 180 days of deposit in the institution was provided.				

Yes $(A \square B \square C \square D \square)$ **No $(A \square B \square C \square D \square)$ Does the grantee have CDBG funded Rehabilitation Programs with completed projects or units?				
*Yes \( No (no CDBG funded Re	ehab. Progran	n		
*Yes: the submission includes: a) a narrative description that identifies the type of program and the number of properties/units completed for each; and b) the total CDBG and other public and private funds involved in the project.				
Yes (A ☐ B ☐ ) **No (A ☐ B ☐	])			
NRSA Does the grantee have an app	roved neighbo	orhood revitalization strategy?		
*Yes				
*Yes: A report of progress against be	nchmarks was	s included in the CAPER.		
Yes				
** Correct information noted and/or requested in PYR	letter.			
WORKSHEETS				
Eligibility/national objective, primary objective, planning and administration, and public service worksheets are completed and attached.				
HOME PJ Worksheet Attached:	Yes 🗌	No - not a HOME PJ		
ESG Worksheet Attached:	Yes	No - not a recipient of ESG funds ⊠		
HOPWA Worksheet:	Yes 🗌	No - not a HOPWA grantee ⊠		
CPD Representative / date				
or a representative, date				

#### ELIGIBILITY / NATIONAL OBJECTIVE WORKSHEET

Review each activity listed on the Activity Summary and CAPER Report to determine if the activities are eligible and meet the national objective. Determine if appropriate matrix codes have been utilized and if all criteria for funding have been met.

Use this review sheet to list questionable activities for follow-up. After consulting with the grantee, enter the result here. Reclassify any misclassified activities, identify any ineligible activities, and take appropriate corrective or remedial action.

#### PRIMARY OBJECTIVE - OVERALL BENEFIT CALCULATION

If national objective codes are incorrect on IDIS reports, please utilize this form to confirm overall benefit. Do the calculation shown below to determine whether the grantee met its certification that at least 70 percent of all CDBG funds expended during one, two, or three consecutive program years, as specified, were for activities benefiting :/M persons. Where the certification is not met, ask for further information and, when necessary, take corrective or remedial action.

To calculate the level of overall benefit this year:

1.	Figure the amount subject to program benefit:
	a. Enter the activity expenditures (on line 15 of IDIS Report number C04PR26)
	\$
	b. Subtract P&A expenditures (line 12 of IDIS Report number C04PR26)
	\$
	c. Equals expenditures subject to overall benefit calculation \$
2.	Figure the percentage of expenditures benefiting L/M Persons:
	a. Enter amount of expenditures benefiting L/M Persons (line 19 IDIS Report number C04PR26)
	\$
	b. Divide by amount subject to program benefit (enter line 1.c). \$
	c. Equal the percentage of expenditures benefiting :/M Persons. \$
3.	Compare the percentage with the overall benefit standard:
	The percentage should be greater than or equal to 79%, if the grantee chose a one year certification period. Yes No
Foi	r two or three year certification periods
	al the cumulative expenditures subject to program benefit and divide by the cumulative expenditures directly benefiting L/M persons (low mod area, ed clientele, housing, and jobs). Ensure that progress is being made towards meeting the requirement within the certification period.
Ce	rtification period 123 years; and program years as identified in the
C	Pertifications: , ,
CA	NPER Certification period <u>1</u> years;
Pro	ogram Year Cumulative Program Expenditures Direct Benefit Expenditures
Си	mulative totals: /
Pei	rcentage:

#### PLANNING AND ADMINISTRATIVE COST CAP WORKSHEET

If IDIS matrix codes are incorrect on any planning and administrative activity, you must verify planning and administrative costs utilizing this form. Calculate the level of planning and administrative cost expenditures according to the steps below. The grantee is required to be within the 20 percent cap. If the grantee has exceeded the cap, ask for further information and, when necessary, take corrective or remedial action.

1.	gure the expenditures cap;			
	a. Enter the grant and program income amount (line 2, plus line C04PR26) \$		oort numbe	e <b>r</b>
	b. Multiply by 20 percent		Χ	.20
	c. Equals the cap \$	<u> </u>		
2.	Figure this year's P&A expenditures:			
	a. Enter total of expenditures for planning & administration (Part C04PR26) \$		DIS Repor	t number
	<ul> <li>Enter total of planning and administrative current year unliquid IDIS Report number C04PR26)</li> </ul>	•	ons (Par V	
	c. Add lines 2.a. and 2.b.	\$		
	d. Enter total of planning and administrative prior year unliquidate Report number C04PR26)	40	s (Part V, I	
	e. Subtract line 2.d. from 2.c.	\$		
3.	Compare cap (on line 1.c.) with P&A expenditures (on line 2.e.):			
	a. Cap exceeded? Yes \( \scale= \) No \( \scale= \) If Yes, amount (line 2.6)	e. minus 1.c.)	) \$	
	b. Divide line 2.e. by line 1.a.			
	P&A expenditures are less than the cap or equal to it	20	_%	
	P&A expenditures exceed the cap		_%	

#### PUBLIC SERVICE COST CAP WORKSHEET

If matrix codes for public service activities are incorrect on IDIS activity reports, please utilize this form to verify the public service cap calculation. Calculate the level of public service obligations according to the steps below. The grantee is required to be within the 15 percent cap. If the grantee has exceeded the cap, ask for further information and, when necessary, take corrective or remedial action.

1.	Figure the obligations cap:		
	a. Enter the grant amount (line 2 of IDIS Report number C04PR	26)\$	
	<ul> <li>b. Multiply by 15 percent (or by the alternative percentages, if appears)</li> </ul>	oplicable, as described in the note  X .15	
	c. Amount	\$	
	d. Enter the amount of program income received in the precedir Report number C02PR26)	ng program year (line 33 of IDIS \$ <u>0</u>	
	e. Multiply by 15 percent	X .15	
	f. Amount	\$ <u>0</u>	
	g. Total of lines 1.c. and 1.f. equals the cap	\$	
2.	Figure this year's public service obligations:		
	a. Enter total of public service expenditures (Part IV, line 27 of IL	DIS Report number C04PR26)	
		\$	
	b. Enter total of public service unliquidated obligations (Part IV, C04PR26)	line 28 of IDIS Report number \$ <u>0</u>	
	c. Add lines 2.a. and 2.b.	\$	
	d. Enter last year's public service unliquidated obligations (Part C04PR26)	IV, line 29 of IDIS Report number \$0	
	e. Subtract line 2.d. from line 2.c.	\$	
3.	Compare cap (on line 1.g.) with obligations (on line 2.e.):		
	a. Cap exceeded? Yes  No If Yes, amount (2.e. min	nus 1.g.): \$	
	b. Add lines 1.a. and 1.d. Divide line 2.e. by sum of line 1.a. and	l 1.d.	
	Obligations are less than the cap or equal to it	%	
	Obligations exceed the cap	%	