



PUBLIC NOTICE & AGENDA
BELOIT COMMUNITY DEVELOPMENT AUTHORITY
City Hall Forum - 100 State Street, Beloit, WI 53511
4:30 PM
Wednesday, March 22, 2023

1. CALL TO ORDER AND ROLL CALL
2. MINUTES
 - 2.a. Consideration of the minutes of the March 8, 2023 Community Development Authority meeting
[Attachment](#)
3. PUBLIC COMMENT
4. BELOIT HOUSING AUTHORITY
 - 4.a. Presentation of the February Activity Report (Cole)
[Attachment](#)
 - 4.b. Presentation of the December 2022 Financial Report (Cole)
[Attachment](#)
5. COMMUNITY AND HOUSING SERVICES
 - 5.a. Presentation of the 2022 Consolidated Annual Performance Evaluation Report (Downing)
[Attachment](#)
6. SUCH OTHER MATTERS AS AUTHORIZED BY LAW
No business to discuss.
7. ADJOURNMENT

** Please note that, upon reasonable notice, at least 24 hours in advance, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information to request this service, please contact the City Clerk's Office at 364-6680, 100 State Street, Beloit, WI 53511.



**MINUTES
COMMUNITY DEVELOPMENT AUTHORITY
City Hall Forum - 100 State Street, Beloit, WI 53511
4:30 PM
Wednesday, March 8, 2023**

This special meeting of the City of Beloit Community Development Authority was held on Wednesday, March 8, 2023 in the Forum of Beloit City Hall, 100 State Street.

1. CALL TO ORDER AND ROLL CALL

Meeting was called to order by Chairperson Philip Gorman at 4:35 p.m. Councilor Forbeck, Councilor Leavy and Vice Chairperson Hartke were present. Commissioner Rodriguez was absent.

2. MINUTES

2.a. Consideration of the minutes of the January 25, 2023 Community Development Authority meeting

Motion to approve was made by Councilor Leavy and seconded by Councilor Forbeck. Motion was approved, voice vote (4-0).

3. PUBLIC COMMENT

No public comments were submitted.

4. BELOIT HOUSING AUTHORITY

4.a. Presentation of The January Activity Report 2023

The January Activity Report was presented by Clinton Cole, Beloit Housing Authority Director.

4.b. Consideration of Resolution 2023-01 Approving Beloit Housing Authority's Fiscal Year 2022 Section Eight Management Assessment Program (SEMAP)

Resolution 2023-01 was presented by Clinton Cole, Beloit Housing Authority Director. Motion to approve was made by Councilor Forbeck and seconded by Councilor Leavy. Motion was approved, voice vote (4-0).

5. COMMUNITY AND HOUSING SERVICES

No business to discuss

6. SUCH OTHER MATTERS AS AUTHORIZED BY LAW

6.a. Public hearing and consideration of Resolution 2023-003 designating the Properties located at 80 and 100 East Grand Avenue as blighted properties

Julie Christensen, Community Development Director, provided an overview of the proposed project. Motion to approve was made by Councilor Leavy and seconded by Councilor Forbeck. Motion was approved, voice vote (4-0).

7. Adjournment

7.a. Motion was made by Councilor Leavy, seconded by Councilor Forbeck to adjourn the meeting at 4:52 p.m. Motion was approved, voice vote (4-0).

Philip Gorman, Chairperson

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	4a		
Topic:	February Activity Report		
Date:	March 22, 2023		
Presenter:	Clinton Cole	Division:	Beloit Housing Authority

Overview/Background Information

The Housing Authority provides monthly activity reports to the Community Development Authority. This report is for information only.

Key Issues

Public Housing:

At the end of this reporting period, there were five public housing vacancies. Four annual and seven interim certifications were completed. Two public housing inspections were conducted.

Housing Choice Voucher (Section 8):

455 vouchers were housed on February 28, 2023, and six port-in vouchers were administered. The Housing Specialists completed 32 annual and 48 interim recertifications during this reporting period. 62 Housing Quality Standards (HQS) inspections were completed.

In February, BHA Special Programs Administrator Maria Arellano attended trainings to allow BHA to be certified as a Trauma Informed agency. She has received certifications in Crisis Intervention, Suicide Prevention, and Behavioral Services training. As a Trauma Informed agency, BHA is able to counsel and connect residents to appropriate agencies in times of crisis.

Conformance with Strategic Plan

Approval of this action would conform with the stated purpose of the following strategic goal:

- Goal #1 - Create and Sustain Safe and Healthy Neighborhoods
- Goal #2 - Create and Sustain a High Performing Organization
- Goal #3 - Create and Sustain Economic and Residential Growth
- Goal #4 - Create and Sustain a High Quality of Life
- Goal #5 - Create and Sustain High Quality Infrastructure and Connectivity
- Goal #6 - Create and Sustain Enhanced Communications and Community Engagement, while maintaining a Positive Image

Sustainability

If applicable, briefly comment on the environmental, economic, and/or social sustainability of this policy or program. Consider how current needs are met without compromising the ability of future generations to meet their own needs.

Write N/A if not applicable: N/A

Action Required/Recommendation

No action required. Information only.

Fiscal Note/Budget Impact

All fiscal/budget impacts are noted in the report.

Attachments

February 2023 Activity Report

**Beloit Community Development Authority
Activity Report to Board for February 2023**

PUBLIC HOUSING

Total Public Housing Units	131 Units	
Occupied on 2/28/2023	126 Units	96% Occupancy
Vacancies on 2/28/2023	5 Units	4% Vacancy
Vacancies by Type		
Elderly	2 Units	95% Occupancy
Family	3 Units	97% Occupancy

Public Housing Inspections

Two annual inspections and two initial inspections were completed during this reporting period.

Public Housing Activities

Annual Recertifications	10
Interim Recertifications	12
Tenant notices to Vacate *Not due to eviction	2
New Tenants	2
Transfers	1
Lease Terminations	0
Possible Program Violations	1
Evictions	0

Public Housing Briefings

Number Notified	10
Number Briefed	5

Section 8 Program

Total Under Lease on 2/28/2023	455 Vouchers
Total Portable Vouchers Paid	0 Vouchers
Total Port Out*	0 Vouchers
Total Port In*	6 Vouchers
February HCV HAP Funds Received	\$265,957
February HCV HAP Funds Expended	\$255,557
Current Per Unit Cost (PUC)	\$562

* Port Out – Not absorbed by other Housing Authorities; paid by Beloit Housing Authority

* Port In – Portable vouchers administered by BHA but paid by other Housing Authorities

Section 8 Inspections

The BHA Inspector completed 38 annual inspections, 20 reinspections, three initial, and one special inspection during this reporting period.

Section 8 Activities

New Participants	2
Annual Recertifications	32
Interim Recertifications	48
Abatements	2
Unit Transfers	4
Possible Program Violations	0
End of Program	4
Port Ins	1
Port Outs	1

Section 8 Briefings

Number Notified	20
Number Briefed/Vouchers Issued	0

APPLICATIONS ON WAITING LIST

Public Housing East	77
Public Housing West	78
Parker Bluff	169
Section 8 Program	262

Family Self-Sufficiency Participants

Section 8 – 21

Public Housing – 14

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	4b		
Topic:	December 2022 Financial Report		
Date:	March 22, 2023		
Presenter:	Clinton Cole	Division:	Beloit Housing Authority

Overview/Background Information

Each month, the Housing Authority provides a financial report to the Community Development Authority. This report is for information only.

Key Issues

Attached is the Beloit Housing Authority Financial Statement prepared by the BHA Accountant as of December 31, 2022.

At the end of this reporting period, the Low Income Public Housing (LIPH) program income was \$595,185.61 and the LIPH expenses were \$465,720.49. There was a surplus of \$129,465.12 in LIPH.

At the end of this reporting period, inflows of revenue from LIPH Grants total \$434,907.45 and related grant expenses total \$434,907.45.

At the end of this reporting period, the Project Based Voucher (PBV) program income was \$0.00 and the expenses were \$2,507.24. The PBV had a deficit of \$2,507.24. The deficit is the result of the program ceasing operations. Operational expenses will continue to be incurred until a decision is made regarding the property at 240 Portland Avenue.

At the end of this reporting period, Phase 1 program income was \$317,273.72 and the expenses were \$270,879.61. Phase 1 had a surplus of \$46,394.11. Of this surplus, \$4.64 is the Housing Authority's portion.

At the end of this reporting period, Phase 2 program income was \$377,834.26 and the expenses were \$339,938.68. Phase 2 had a surplus of \$37,895.58. Of this surplus, \$3.79 is the Housing Authority's portion.

At the end of this reporting period, the Housing Choice Voucher (HCV) program income was \$3,225,682.67 and expenses were \$3,287,112.29. The HCV program had a deficit of \$61,429.60.

Debts owed BHA collected through December 2022: Total \$8,162.44
 TRIP Program: \$8,162.44 Repayments: \$0.00

Conformance with Strategic Plan

- Approval of this agreement would conform with the stated purpose of the following strategic goal:
- Goal #1 - Create and Sustain Safe and Healthy Neighborhoods
 - Goal #2 - Create and Sustain a High Performing Organization
 - Goal #3 - Create and Sustain Economic and Residential Growth
 - Goal #4 - Create and Sustain a High Quality of Life
 - Goal #5 - Create and Sustain High Quality Infrastructure and Connectivity
 - Goal #6 - Create and Sustain Enhance Communications and Community Engagement, while maintaining a Positive Image

Sustainability

If applicable, briefly comment on the environmental, economic, and/or social sustainability of this policy or program. Consider how current needs are met without compromising the ability of future generations to meet their own needs. Write N/A if not applicable: N/A

Action Required/Recommendation

No action required. Information only.

Fiscal Note/Budget Impact

All fiscal/budget impacts are noted in the report.

Attachments

December 2022 Financial Report

Consolidated 2022 Budget Report for LIPH/PBV - As of December 31, 2022

	YTD Actual					Annual Board Approved Budget		
	Income	Approved YTD	LIPH	LIPH Grants	PBV	Total	LIPH/PBV	Total
1 Dwelling Rental	-					-		-
2 Excess Utilities	-					-		-
3 Interest on Unrestricted Fund Investments	50.00	1,040.07				1,040.07	50.00	50.00
4 Income - Transfer In from Other Funds	-					-		-
5 Other Income - Tenants	-					-		-
6 HAP Fraud Recovery & FSS Forfeitures	-					-		-
7 Other Income - Bad Debt Collections	3,000.00	1,887.13				1,887.13	3,000.00	3,000.00
8 Other Income - Laundry/Copy Fees/Misc	28,000.00	64,342.41				64,342.41	28,000.00	28,000.00
9 Other Income - CFP Operation Money	170,000.00		341,613.74			341,613.74	170,000.00	170,000.00
10 Other Income - Sale of Asset Gain/Loss	-	600.00				600.00		-
11 Admin Fees Earned - HUD	-					-		-
12 Incoming Billable Admin Fees/Oper Sub	17,911.14					-	17,911.14	17,911.14
13 ROSS/FSS Grant	82,130.53		93,293.71			93,293.71	82,130.53	82,130.53
14 HAP Subsidy	-					-		-
15 Operating Subsidy	490,718.00	527,316.00				527,316.00	490,718.00	490,718.00
Total Income	791,809.67	595,185.61	434,907.45	-	1,030,093.06	791,809.67	791,809.67	791,809.67
Expenses								
	Approved YTD	LIPH	LIPH Grant	PBV	Total	LIPH/PBV	Total	
Administrative Expenses								
16 Admin Salaries	83,130.74	70,545.39			70,545.39	83,130.74		83,130.74
17 ROSS/FSS Coordinator Admin Salaries	64,072.32		68,985.18		68,985.18	64,072.32		64,072.32
18 Admin Employee Benefits	40,912.80	32,382.98			32,382.98	40,912.80		40,912.80
19 ROSS/FSS Coordinator Admin Benefits	19,495.44		23,965.60		23,965.60	19,495.44		19,495.44
20 Advertising & Marketing	50.00	64.41			64.41	50.00		50.00
21 Legal	100.00				-	100.00		100.00
22 Staff Training	2,500.00		1,437.00		1,437.00	2,500.00		2,500.00
23 Travel	250.00	192.44			192.44	250.00		250.00
24 Accounting Consultants	7,250.00	4,215.00		1,289.00	5,504.00	7,250.00		7,250.00
25 Audit Fee	11,440.00	14,997.50			14,997.50	11,440.00		11,440.00
26 Telephone	1,901.94	1,689.25			1,689.25	1,901.94		1,901.94
27 Postage	2,799.44	4,498.27	160.31		4,658.58	2,799.44		2,799.44
28 Office Supplies	400.00	360.40	182.62		543.02	400.00		400.00
29 Memberships & Publications	2,048.00	674.93			674.93	2,048.00		2,048.00
30 Bank Fees	-				-			-
31 Computer Maintenance	-				-			-
32 Copier Expenses	2,500.00	2,040.12			2,040.12	2,500.00		2,500.00
33 Office Equipment Maintenance	-				-			-
34 Postage Machine	-				-			-
35 Software Maintenance	4,000.00	8,711.74	4,886.64		13,598.38	4,000.00		4,000.00
36 Outgoing Portable Admin Fees	-				-			-
37 Sundry Administration/Compliance Fees	700.00	3,810.85			3,810.85	700.00		700.00
38 Port-In HAP Expense	-				-			-
39 Management Fees	-				-			-
40 Eviction & Collection Agent Fees	-				-			-
41 HAP Expense (net fraud recovery to HUD)	-				-			-
HAP Overfunding (Underfunding)	-				-			-

	Maintenance Expenses	-							
42	Maintenance Salaries	3,000.00				-	3,000.00		3,000.00
43	Casual Labor - Maintenance	-				-			-
44	Maintenance Benefits	1,000.00				-	1,000.00		1,000.00
45	Maintenance Materials & Supplies	500.00	117.07			117.07	500.00		500.00
46	Plumbing Supplies	-	67.93			67.93			-
47	Locks, Locksets & Keys	-	49.55			49.55			-
48	Electrical Supplies	-	38.97			38.97			-
49	Painting Supplies	-				-			-
50	Cleaning Supplies	200.00	685.29			685.29	200.00		200.00
51	Equipment Repair Parts	-				-			-
52	Maintenance Contracted Services	1,500.00	240.72			240.72	1,500.00		1,500.00
53	Refuse Removal Services	100.00				-	100.00		100.00
54	Plumbing Repair Services	-	300.00			300.00			-
55	Heating/AC Repair Services	-				-			-
56	Electric Repair Service	-				-			-
57	Window Repair Service	-				-			-
58	Automotive Repairs/Fuel	-	82.00			82.00			-
59	Elevator Repair & Maintenance	1,500.00	1,499.35			1,499.35	1,500.00		1,500.00
60	Pest Control Services	-				-			-
61	Cable TV	-				-			-
62	Answering Service	3,200.00	4,269.22			4,269.22	3,200.00		3,200.00
63	Misc Contracts	-				-			-
64	Clean/Paint Units	-				-			-
	Utilities Expenses	-							
65	Water/Sewer	1,600.00	1,445.94	365.30		1,811.24	1,600.00		1,600.00
66	Electricity	5,500.00	7,020.35	272.32		7,292.67	5,500.00		5,500.00
67	Natural Gas	2,500.00	2,804.66	384.78		3,189.44	2,500.00		2,500.00
	Other Operating Expenses	-							
68	Protective Services Contract	2,000.00	2,004.71			2,004.71	2,000.00		2,000.00
69	Insurance	15,929.75	15,733.88	195.84		15,929.72	15,929.75		15,929.75
70	PILOT	-				-	-		-
71	Compensated Absences	-	650.35			650.35			-
72	Collection Losses	-				-			-
73	Replacement Reserves & Debt Pmt-Princ	-				-			-
74	Other General Expense/Asset Mgmt Fees	301,387.92	284,527.22			284,527.22	301,387.92		301,387.92
75	Casualty Losses - Non Capitalized	-				-			-
76	Capital Expenditures	167,500.00		335,290.10		335,290.10	167,500.00		167,500.00
77	Transfer In / Out	-				-			-
	Total Expense	750,968.35	465,720.49	434,907.45	2,507.24	903,135.18	750,968.35	-	750,968.35

Net Income/(Loss):

129,465.12	-	(2,507.24)	126,957.88
------------	---	------------	------------

**Cash Flow Statement
Beloit Housing Authority
LIPH/PBV
As of 12/31/2022**

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income					
Dwelling Rent/Utilities	-		-		-
Interest on Investments	1,040.07		50.00	0.00%	990.07
Other Income	66,829.54	341,613.74	201,000.00	203.21%	207,443.28
HUD Admin Fees			-		-
HUD Grants/Subsidies	527,316.00	93,293.71	590,759.67	105.05%	29,850.04
Total Income	595,185.61	434,907.45	791,809.67		238,283.39
Expenses					
Administrative					
Salaries/Benefits	102,928.37	92,950.78	207,611.30	94.35%	11,732.15
Office Expenses	31,792.05	6,666.57	33,439.38	115.01%	(5,019.24)
Office Contracted Services	10,751.86		6,500.00	165.41%	(4,251.86)
Oper Sub Transfer/Mgmt Fee Pd			-		-
Housing Assistance Pmts			-		-
HAP Payments Port In					
Maintenance					
Salaries/Benefits	-		-		-
Materials & Supplies	958.81	-	700.00	136.97%	(258.81)
Maintenance Contracts	6,391.29		6,300.00	101.45%	(91.29)
Utilities	12,293.35		9,600.00	128.06%	(2,693.35)
Other Operating					
Protective Services	2,004.71		2,000.00	100.24%	(4.71)
Insurance	15,929.72		15,929.75	100.00%	0.03
PILOT	-		-	0.00%	-
Other Operating Expenses	285,177.57	335,290.10	468,887.92	132.33%	(151,579.75)
Total Expenses	468,227.73	434,907.45	750,968.35		(152,166.83)
Net Admin Income (Loss)	126,957.88	-			
Net HAP Income (Loss)					
Total YTD Income (Loss)	126,957.88	-			

Consolidated 2022 Budget Report for Phase 1 - As of December 31, 2022

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
1 Dwelling Rental	118,000.00	151,653.53	151,653.53	118,000.00		118,000.00
2 Excess Utilities	-		-			-
3 Interest on Unrestricted Fund Investments	200.00	646.61	646.61	200.00		200.00
4 Income - Transfer In from Other Funds	-	26,991.95	26,991.95			-
5 Other Income - Tenants	6,505.38	17,970.70	17,970.70	6,505.38		6,505.38
6 HAP Fraud Recovery & FSS Forfeitures	-		-			-
7 Other Income - Bad Debt Collections	5,000.00	1,048.51	1,048.51	5,000.00		5,000.00
8 Other Income - Laundry/Copy Fees/Misc	-	1.00	1.00			-
9 Other Income - CFP Operation Money	-		-			-
10 Other Income - Sale of Asset Gain/Loss	-		-			-
11 Admin Fees Earned - HUD	-		-			-
12 Incoming Billable Admin Fees/Oper Sub	161,887.92	118,961.42	118,961.42	161,887.92		161,887.92
13 ROSS/CFP Grant	-		-			-
14 HAP Subsidy	-		-			-
15 Operating Subsidy	-		-			-
Total Income	291,593.30	317,273.72	317,273.72	291,593.30		291,593.30

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
Administrative Expenses						
16 Admin Payroll Expenses	87,248.68	86,895.10	86,895.10	87,248.68		87,248.68
17 FSS Coordinator Admin Salaries	-		-			-
18 FSS Coordinator Admin Benefits	-		-			-
19 Advertising & Marketing	50.00	87.07	87.07	50.00		50.00
20 Legal	2,200.00	132.50	132.50	2,200.00		2,200.00
21 Staff Training	-		-			-
22 Travel	-		-			-
23 Accounting Consultants	6,300.00	6,471.18	6,471.18	6,300.00		6,300.00
24 Audit Fee	12,000.00	11,400.00	11,400.00	12,000.00		12,000.00
25 Telephone	-		-			-
26 Postage	-		-			-
27 Office Supplies	260.00	427.35	427.35	260.00		260.00
28 Memberships & Publications	-		-			-
29 Bank Fees	51.60	83.10	83.10	51.60		51.60
30 Computer Maintenance	-		-			-
31 Copier Expenses	-		-			-
32 Office Equipment Maintenance	-		-			-
33 Postage Machine	-		-			-
34 Software Maintenance	3,317.88	3,797.77	3,797.77	3,317.88		3,317.88
35 Outgoing Portable Admin Fees	-		-			-
36 Sundry Administration/Compliance Fees	4,000.00	6,713.86	6,713.86	4,000.00		4,000.00
37 Port-In HAP Expense	-		-			-
38 Management Fees	5,843.60	7,657.85	7,657.85	5,843.60		5,843.60

39	Eviction & Collection Agent Fees	-		-		-	
40	HAP Expense (net fraud recovery to HUD)	-		-		-	
	HAP Overfunding (Underfunding)	-				-	
	Maintenance Expenses	-					
42	Maintenance Payroll Expenses	100,221.93	72,630.53	72,630.53	100,221.93	100,221.93	
43	Casual Labor - Maintenance	-		-		-	
44	Maintenance Materials & Supplies	7,000.00	11,779.06	11,779.06	7,000.00	7,000.00	
45	Plumbing Supplies	-		-		-	
46	Locks, Locksets & Keys	-		-		-	
47	Electrical Supplies	-		-		-	
48	Painting Supplies	-		-		-	
49	Cleaning Supplies	-		-		-	
50	Equipment Repair Parts	-		-		-	
51	Maintenance Contracted Services	10,750.00	14,493.45	14,493.45	10,750.00	10,750.00	
52	Refuse Removal Services	1,250.00		-	1,250.00	1,250.00	
53	Plumbing Repair Services	-		-		-	
54	Heating/AC Repair Services	1,000.00	1,633.50	1,633.50	1,000.00	1,000.00	
55	Electric Repair Service	-		-		-	
56	Window Repair Service	-		-		-	
57	Automotive Repairs/Fuel	2,276.34	3,596.26	3,596.26	2,276.34	2,276.34	
58	Elevator Repair & Maintenance	-		-		-	
59	Pest Control Services	1,000.00		-	1,000.00	1,000.00	
60	Cable TV	-	(29.00)	(29.00)		-	
61	Answering Service	-		-		-	
62	Misc Contracts	-		-		-	
63	Clean/Paint Units	-		-		-	
	Utilities Expenses	-					
64	Water/Sewer	5,500.00	3,840.06	3,840.06	5,500.00	5,500.00	
65	Electricity	1,400.00	1,193.37	1,193.37	1,400.00	1,400.00	
66	Natural Gas	1,000.00	825.07	825.07	1,000.00	1,000.00	
	Other Operating Expenses	-					
67	Protective Services Contract	10,000.00	5,000.00	5,000.00	10,000.00	10,000.00	
68	Insurance	14,083.30	14,083.32	14,083.32	14,083.30	14,083.30	
69	PILOT	11,500.00	14,918.21	14,918.21	11,500.00	11,500.00	
70	Compensated Absences	-		-		-	
71	Collection Losses	-		-		-	
72	Replacement Reserves & Debt Pmt-Princ	-		-		-	
73	Other General Expense/Asset Mgmt Fees	3,275.00	3,250.00	3,250.00	3,275.00	3,275.00	
74	Casualty Losses - Non Capitalized	-		-		-	
75	Capital Expenditures	-		-		-	
76	Transfer In / Out	-		-		-	
	Total Expense	291,528.33	270,879.61	270,879.61	291,528.33	-	291,528.33

Net Income/(Loss):

46,394.11 46,394.11

Housing Authority's Portion of Net Income/(Loss):

4.64

Cash Flow Statement
Beloit Housing Authority
Phase 1
As of 12/31/2022

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income				
Dwelling Rent/Utilities	151,653.53	118,000.00	128.52%	33,653.53
Interest on Investments	646.61	200.00	323.31%	446.61
Other Income	164,973.58	173,393.30	95.14%	(8,419.72)
HUD Admin Fees		-		-
HUD Grants/Subsidies		-		-
Total Income	317,273.72	291,593.30		25,680.42
		-		
Expenses				
Administrative				
Salaries/Benefits	86,895.10	87,248.68	99.59%	353.58
Office Expenses	29,112.83	24,861.60	117.10%	(4,251.23)
Office Contracted Services		3,317.88		3,317.88
Oper Sub Transfer/Mgmt Fee F	7,657.85	5,843.60	131.05%	(1,814.25)
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	72,630.53	100,221.93	72.47%	27,591.40
Materials & Supplies	11,779.06	7,000.00	168.27%	(4,779.06)
Maintenance Contracts	19,694.21	16,276.34	121.00%	(3,417.87)
Utilities	5,858.50	7,900.00	74.16%	2,041.50
Other Operating				
Protective Services	5,000.00	10,000.00		5,000.00
Insurance	14,083.32	14,083.30	100.00%	(0.02)
PILOT	14,918.21	11,500.00	129.72%	(3,418.21)
Other Operating Expenses	3,250.00	3,275.00	99.24%	25.00
Total Expenses	270,879.61	291,528.33		20,648.72
Net Admin Income (Loss)	46,394.11			
Net HAP Income (Loss)				
Total YTD Income (Loss)	46,394.11			
Housing Authority's Portion	4.64			

Consolidated 2022 Budget Report for Phase 2 - As of December 31, 2022

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
1 Dwelling Rental	141,000.00	159,791.00	159,791.00	141,000.00		141,000.00
2 Excess Utilities	-		-			-
3 Interest on Unrestricted Fund Investments	750.00	1,265.95	1,265.95	750.00		750.00
4 Income - Transfer In from Other Funds	-	26,609.54	26,609.54			-
5 Other Income - Tenants	1,200.00	10,080.97	10,080.97	1,200.00		1,200.00
6 HAP Fraud Recovery & FSS Forfeitures	-		-			-
7 Other Income - Bad Debt Collections	5,000.00	503.00	503.00	5,000.00		5,000.00
8 Other Income - Laundry/Copy Fees/Misc	-	25.00	25.00			-
9 Other Income - CFP Operation Money	-		-			-
10 Other Income - Sale of Asset Gain/Loss	-		-			-
11 Admin Fees Earned - HUD	-		-			-
12 Incoming Billable Admin Fees/Oper Sub	139,500.00	179,558.80	179,558.80	139,500.00		139,500.00
13 ROSS/CFP Grant	-		-			-
14 HAP Subsidy	-		-			-
15 Operating Subsidy	-		-			-
Total Income	287,450.00	377,834.26	377,834.26	287,450.00		287,450.00

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
Administrative Expenses						
16 Admin Payroll Expenses	70,536.57	75,708.58	75,708.58	70,536.57		70,536.57
17 FSS Coordinator Admin Salaries	-		-			-
18 FSS Coordinator Admin Benefits	-		-			-
19 Advertising & Marketing	50.00	44.68	44.68	50.00		50.00
20 Legal	1,500.00	492.19	492.19	1,500.00		1,500.00
21 Staff Training	-		-			-
22 Travel	-		-			-
23 Accounting Consultants	6,300.00	6,458.00	6,458.00	6,300.00		6,300.00
24 Audit Fee	11,000.00	10,800.00	10,800.00	11,000.00		11,000.00
25 Telephone	-		-			-
26 Postage	-		-			-
27 Office Supplies	260.00	423.52	423.52	260.00		260.00
28 Memberships & Publications	-		-			-
29 Bank Fees	-		-			-
30 Computer Maintenance	-		-			-
31 Copier Expenses	-		-			-
32 Office Equipment Maintenance	-		-			-
33 Postage Machine	-		-			-
34 Software Maintenance	3,317.87	3,797.76	3,797.76	3,317.87		3,317.87
35 Outgoing Portable Admin Fees	-		-			-
36 Sundry Administration/Compliance Fees	4,000.00	5,482.72	5,482.72	4,000.00		4,000.00
37 Port-In HAP Expense	-		-			-
38 Management Fees	12,067.54	16,423.34	16,423.34	12,067.54		12,067.54

39	Eviction & Collection Agent Fees	-		-		-
40	HAP Expense (net fraud recovery to HUD)	-		-		-
	HAP Overfunding (Underfunding)	-				-
	Maintenance Expenses					
42	Maintenance Payroll Expenses	75,230.12	87,748.91	87,748.91	75,230.12	75,230.12
43	Casual Labor - Maintenance	-		-		-
44	Maintenance Materials & Supplies	7,000.00	10,909.63	10,909.63	7,000.00	7,000.00
45	Plumbing Supplies	-		-		-
46	Locks, Locksets & Keys	-		-		-
47	Electrical Supplies	-		-		-
48	Painting Supplies	-		-		-
49	Cleaning Supplies	-		-		-
50	Equipment Repair Parts	-		-		-
51	Maintenance Contracted Services	10,000.00	16,583.27	16,583.27	10,000.00	10,000.00
52	Refuse Removal Services	3,000.00	3,596.00	3,596.00	3,000.00	3,000.00
53	Plumbing Repair Services	-		-		-
54	Heating/AC Repair Services	1,200.00	6,554.64	6,554.64	1,200.00	1,200.00
55	Electric Repair Service	-		-		-
56	Window Repair Service	-		-		-
57	Automotive Repairs/Fuel	1,877.36	3,255.58	3,255.58	1,877.36	1,877.36
58	Elevator Repair & Maintenance	2,750.00	1,581.35	1,581.35	2,750.00	2,750.00
59	Pest Control Services	500.00	1,900.00	1,900.00	500.00	500.00
60	Cable TV	1,750.00	5,725.57	5,725.57	1,750.00	1,750.00
61	Answering Service	-		-		-
62	Misc Contracts	-		-		-
63	Clean/Paint Units	-		-		-
	Utilities Expenses					
64	Water/Sewer	7,000.00	10,514.79	10,514.79	7,000.00	7,000.00
65	Electricity	12,000.00	21,635.81	21,635.81	12,000.00	12,000.00
66	Natural Gas	7,000.00	8,387.80	8,387.80	7,000.00	7,000.00
	Other Operating Expenses					
67	Protective Services Contract	11,000.00	5,956.35	5,956.35	11,000.00	11,000.00
68	Insurance	15,042.04	15,042.08	15,042.08	15,042.04	15,042.04
69	PILOT	11,500.00	12,046.26	12,046.26	11,500.00	11,500.00
70	Compensated Absences	-		-		-
71	Collection Losses	-		-		-
72	Replacement Reserves & Debt Pmt-Princ	-		-		-
73	Other General Expense/Asset Mgmt Fees	7,025.00	8,869.85	8,869.85	7,025.00	7,025.00
74	Casualty Losses - Non Capitalized	-		-		-
75	Capital Expenditures	-		-		-
76	Transfer In / Out	-		-		-
	Total Expense	282,906.50	339,938.68	339,938.68	282,906.50	- 282,906.50

Net Income/(Loss):

37,895.58

37,895.58

Housing Authority's Portion of Net Income/(Loss):

3.79

Cash Flow Statement
Beloit Housing Authority
Phase 2
As of 12/31/2022

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income				
Dwelling Rent/Utilities	159,791.00	141,000.00	113.33%	18,791.00
Interest on Investments	1,265.95	750.00	168.79%	515.95
Other Income	216,777.31	145,700.00	148.78%	71,077.31
HUD Admin Fees		-		-
HUD Grants/Subsidies		-		-
Total Income	377,834.26	287,450.00		90,384.26

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses				
Administrative				
Salaries/Benefits	75,708.58	70,536.57	107.33%	(5,172.01)
Office Expenses	27,498.87	23,110.00	118.99%	(4,388.87)
Office Contracted Services		3,317.87		3,317.87
Oper Sub Transfer/Mgmt Fee F	16,423.34	12,067.54	136.10%	(4,355.80)
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	87,748.91	75,230.12	116.64%	(12,518.79)
Materials & Supplies	10,909.63	7,000.00	155.85%	(3,909.63)
Maintenance Contracts	39,196.41	21,077.36	185.96%	(18,119.05)
Utilities	40,538.40	26,000.00	155.92%	(14,538.40)
Other Operating				
Protective Services	5,956.35	11,000.00	54.15%	5,043.65
Insurance	15,042.08	15,042.04	100.00%	(0.04)
PILOT	12,046.26	11,500.00	104.75%	(546.26)
Other Operating Expenses	8,869.85	7,025.00	126.26%	(1,844.85)
Total Expenses	339,938.68	282,906.50		(57,032.18)

Net Admin Income (Loss)	37,895.58
Net HAP Income (Loss)	
Total YTD Income (Loss)	37,895.58
Housing Authority's Portion	<u>3.79</u>

Consolidated 2022 Budget Report for Housing Choice Voucher - As of December 31, 2022

		YTD Actual			Annual Board Approved Budget		
Income	Approved YTD		HCV	HCV Total		HCV	Total
1	Dwelling Rental	-		-			-
2	Excess Utilities	-		-			-
3	Interest on Unrestricted Fund Investments	750.00		2,055.30		750.00	750.00
4	Income - Transfer In from Other Funds	-		-			-
5	Other Income - Tenants/Landlords	-		30,114.00			-
6	HAP Fraud Recovery & FSS Forfeitures	500.00		-		500.00	500.00
7	Other Income - Bad Debt Collections	-		1,427.59			-
8	Other Income - Laundry/Copy Fees/Misc	34,050.26		32,364.00		34,050.26	34,050.26
9	Other Income - CFP Operation Money	-		-			-
10	Other Income - Sale of Asset Gain/Loss	-		-			-
11	Admin Fees Earned - HUD	337,390.00		329,338.00		337,390.00	337,390.00
12	Incoming Billable Admin Fees/Oper Sub	2,000.00		3,309.78		2,000.00	2,000.00
13	ROSS/CFP Grant	-					
14	HAP Subsidy	2,892,192.00		2,827,074.00		2,892,192.00	2,892,192.00
15	Operating Subsidy	-		-			-
	Total Income	3,266,882.26		3,225,682.67		3,266,882.26	3,266,882.26
Expenses							
Expenses	Approved YTD		HCV	HCV Total		HCV	Total
Administrative Expenses							
16	Admin Salaries	209,710.20		199,559.25		209,710.20	209,710.20
17	FSS Coordinator Admin Salaries	-		-			-
18	Admin Employee Benefits	72,288.08		64,497.18		72,288.08	72,288.08
19	FSS Coordinator Admin Benefits	-		-			-
20	Advertising & Marketing	50.00		-		50.00	50.00
21	Legal	500.00		-		500.00	500.00
22	Staff Training	1,750.00		-		1,750.00	1,750.00
23	Travel	500.00		477.02		500.00	500.00
24	Accounting Consultants	6,214.00		7,153.00		6,214.00	6,214.00
25	Audit Fee	11,000.00		14,997.50		11,000.00	11,000.00
26	Telephone	1,540.96		1,303.23		1,540.96	1,540.96
27	Postage	-		-			-
28	Office Supplies	2,000.00		2,313.82		2,000.00	2,000.00
29	Memberships & Publications	700.00		604.93		700.00	700.00
30	Bank Fees	2,905.64		4,218.44		2,905.64	2,905.64
31	Computer Maintenance	-		-			-
32	Copier Expenses	2,503.42		2,040.17		2,503.42	2,503.42
33	Office Equipment Maintenance	-		-			-
34	Postage Machine	3,500.00		4,570.27		3,500.00	3,500.00
35	Software Maintenance	5,750.00		22,513.65		5,750.00	5,750.00
36	Outgoing Portable Admin Fees	-		-			-
37	Sundry Administration/Compliance Fees	3,500.00		11,029.34		3,500.00	3,500.00
38	Port-In HAP Expense	-		32,364.00			-

39	Management Fees	-	-	-	-	-
40	Eviction & Collection Agent Fees	-	-	-	-	-
41	HAP Expense (net fraud recovery to HUD)	2,758,863.94	2,914,582.00	2,914,582.00	2,758,863.94	2,758,863.94
	HAP Overfunding (Underfunding)	133,828.06	(87,508.00)		133,828.06	133,828.06
	Maintenance Expenses	-	-	-	-	-
42	Maintenance Salaries	-	-	-	-	-
43	Casual Labor - Maintenance	-	-	-	-	-
44	Maintenance Benefits	-	-	-	-	-
45	Maintenance Materials & Supplies	-	-	-	-	-
46	Plumbing Supplies	-	-	-	-	-
47	Locks, Locksets & Keys	-	-	-	-	-
48	Electrical Supplies	-	-	-	-	-
49	Painting Supplies	-	-	-	-	-
50	Cleaning Supplies	-	-	-	-	-
51	Equipment Repair Parts	-	-	-	-	-
52	Maintenance Contracted Services	-	-	-	-	-
53	Refuse Removal Services	500.00	788.22	788.22	500.00	500.00
54	Plumbing Repair Services	-	-	-	-	-
55	Heating/AC Repair Services	-	-	-	-	-
56	Electric Repair Service	-	-	-	-	-
57	Window Repair Service	-	-	-	-	-
58	Automotive Repairs/Fuel	357.00	-	-	357.00	357.00
59	Elevator Repair & Maintenance	-	-	-	-	-
60	Pest Control Services	-	-	-	-	-
61	Cable TV	-	-	-	-	-
62	Answering Service	-	-	-	-	-
63	Misc Contracts	-	-	-	-	-
64	Clean/Paint Units	-	-	-	-	-
	Utilities Expenses	-	-	-	-	-
65	Water/Sewer	-	-	-	-	-
66	Electricity	-	-	-	-	-
67	Natural Gas	-	-	-	-	-
	Other Operating Expenses	-	-	-	-	-
68	Protective Services Contract	-	-	-	-	-
69	Insurance	2,105.91	2,105.92	2,105.92	2,105.91	2,105.91
70	PILOT	-	-	-	-	-
71	Compensated Absences	-	829.55	829.55	-	-
72	Collection Losses	-	-	-	-	-
73	Replacement Reserves & Debt Pmt-Princ	-	-	-	-	-
74	Other General Expense/Asset Mgmt Fees	4,400.00	1,164.80	1,164.80	4,400.00	4,400.00
75	Casualty Losses - Non Capitalized	-	-	-	-	-
76	Capital Expenditures	-	-	-	-	-
77	Transfer In / Out	-	-	-	-	-
	Total Expense	3,224,467.21	3,287,112.29	3,287,112.29	-	3,090,639.15
						3,224,467.21

Net Income/(Loss):

(61,429.62)

**Cash Flow Statement
Beloit Housing Authority
Housing Choice Voucher
As of 12/31/2022**

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income				
Dwelling Rent/Utilities		-		-
Interest on Investments	2,055.30	750.00	274.04%	1,305.30
Other Income	63,905.59	36,550.26	174.84%	27,355.33
HUD Admin Fees	329,338.00	337,390.00	97.61%	(8,052.00)
HUD Grants/Subsidies	2,830,383.78	2,892,192.00	0.00%	(61,808.22)
Total Income	3,225,682.67	3,266,882.26		(41,199.59)
		-		

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses				
Administrative				
Salaries/Benefits	264,056.43	281,998.28	93.64%	17,941.85
Office Expenses	42,097.28	30,660.60	137.30%	(11,436.68)
Office Contracted Services	29,912.31	11,753.42	254.50%	(18,158.89)
Oper Sub Transfer/Mgmt Fee Pd		-		-
Housing Assistance Pmts	2,914,582.00	2,758,863.94	105.64%	(155,718.06)
HAP Payments Port In	32,364.00		0.00%	(32,364.00)
Maintenance				
Salaries/Benefits		-		-
Materials & Supplies		-		-
Maintenance Contracts		857.00	0.00%	857.00
Utilities		-		-
Other Operating				
Protective Services		-		-
Insurance	2,105.92	2,105.91	100.00%	(0.01)
PILOT		-		-
Other Operating Expenses	1,994.35	4,400.00	45.33%	2,405.65
Total Expenses	3,287,112.29	3,090,639.15		(196,473.14)
Net Income/(Loss):	<u><u>(61,429.62)</u></u>			

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	5a		
Topic:	Public Presentation - 2022 Consolidated Annual Performance Report (CAPER)		
Date:	March 22, 2023		
Presenter:	Teri Downing	Division:	Community and Housing Services

Overview/Background Information

The Department of Housing and Urban Development (HUD) requires each CDBG Formula Grantee to submit a Consolidated Annual Performance Report (CAPER) at the end of each program year. This year-end report includes the activities and accomplishments of the City’s Community Development Block Grant funding for 2022. **This is a public presentation only; no action needs to be taken.**

Key Issues

1. The 30-day public comment period is 2-28-2023 through 3-28-2023.
2. During the 30-day public comment period, the CAPER is available for review at City Hall at the first floor lobby front desk, at the Beloit Public Library, and on the City’s website on the Community Development webpage.
3. Any comments submitted during the 30-day public review period and public hearing will be incorporated into the CAPER for submission to HUD.
4. A public hearing on the 2022 CAPER was held by Beloit City Council on 3-20-2023.
5. **The CAPER must be submitted to HUD on 3-31-2023.**

Conformance with Strategic Plan

Approval of this agreement would conform with the stated purpose of the following strategic goal:

- Goal #1 - Create and Sustain Safe and Healthy Neighborhoods
- Goal #2 - Create and Sustain a High Performing Organization
- Goal #3 - Create and Sustain Economic and Residential Growth
- Goal #4 - Create and Sustain a High Quality of Life
- Goal #5 - Create and Sustain High Quality Infrastructure and Connectivity
- Goal #6 - Create and Sustain a Positive Image, Enhance Communications and Engage the Community

Sustainability

If applicable, briefly comment on the environmental, economic, and/or social sustainability of this policy or program. Consider how current needs are met without compromising the ability of future generations to meet their own needs. **Write N/A if not applicable**

The CDBG program complies with Social Sustainability by providing funds to activities that are in the best interest of the health and well-being of our residents. The CDBG funds are used to most effectively meet the needs of the community and invest in programs that promote healthy lifestyles or prevent negative health outcomes.

Action Required/Recommendation

Public presentation of 2022 CAPER. For information only. No action is needed.

Fiscal Note/Budget Impact

N/A

Attachments

2022 Consolidated Annual Performance Report (CAPER)



2022 CAPER (PY3)

The 2022 Consolidated Annual Performance and Evaluation Report (CAPER) includes Narrative Responses to questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations. (PY = Program Year)

GRANTEE: City of Beloit

CON PLAN PERIOD: 2020 to 2024

CR-05 - Goals and Outcomes

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

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

Throughout 2022, the City of Beloit continued to develop the activities and projects that were undertaken by Community Housing Development Organizations (CHDO) in the two designated Neighborhood Revitalization Strategy Areas. Although this portion of the approach is not funded by CDBG, the City of Beloit has fostered a successful partnership with ACTS Housing, to encourage and support more homeownership within the city. This effort, along with the continued CDBG funded efforts have resulted in a boost of homeownership, neighborhood pride, and increased property investments.

In addition to the NRSA activities, the City of Beloit also funded the following activities in 2022:

Housing Rehabilitation: The City's Housing Rehab Loan Program provided home improvement loans with low or no interest, deferred, grants, or forgivable terms to households through-out the city.

Health Services: HealthNet provided medical, dental and behavioral healthcare to 26 Beloit residents with no insurance. This agency allows people to obtain services that they would otherwise not be able to afford or obtain. This access, in turn, contributes to continued employment and maintaining affordable living expenses.

Homeless and Prevention Services: The Defy Domestic Abuse Beloit program provided short-term emergency housing and case management to 32 survivors of domestic violence. Family Promise of Greater Beloit provided short-term shelter, rent assistance, eviction prevention, and case management to 57 residents. Project 16:49 provided transitional living facilities and case management to 18 unaccompanied youth. ECHO was able to provide emergency eviction prevention services to 31 households. Beloit Meals on Wheels provided daily meals to 183 seniors and or disabled persons within Beloit. The Retired and Senior Volunteer Program was able to offer transportation services to 286 clients. And the Salvation Army was able to provide supportive services to 20 households.

Job Training: Stateline Literacy Council provided ESL instruction to 75 students. Community Action provided job training to 14 individuals through their Fatherhood program. Community Action also assisted 34 youth ages 16- 24 to complete their secondary education and also receive job training through their Fresh Start program.

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

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

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Affordable Housing	Affordable Housing	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	2047	1502	73.38%			
Affordable Housing	Affordable Housing	CDBG: \$	Rental units rehabilitated	Household Housing Unit	5	1	20.00%	5	1	20.00%
Affordable Housing	Affordable Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	5	5	100.00%	5	5	100.00%

Comprehensive Case Management Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	0				
Comprehensive Case Management Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	422	380	90.05%	422	380	90.05%
Economic Development	Non-Housing Community Development	CDBG: \$	Jobs created/retained	Jobs	8	8	100.00%			
Economic Development	Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	8	8	100.00%	8	8	100.00%
Future Ready Skill Training	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	427	340	79.63%	427	340	79.63%

Homeless Services	Homeless	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	313	446	142.49%	313	446	142.49%
Homeless Services	Homeless	CDBG: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	241	214	88.80%			
Homeless Services	Homeless	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	75	77	102.67%	100	42	42.00%
Homeless Services	Homeless	CDBG: \$	Homelessness Prevention	Persons Assisted	650	759	116.77%	650	759	116.77%
Improve Housing Stock	Affordable Housing Homeless Housing - Improve Substandard Housing	CDBG: \$	Rental units rehabilitated	Household Housing Unit	5	1	20.00%	10	1	10.00%
Improve Housing Stock	Affordable Housing Homeless Housing - Improve Substandard Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	5	5	100.00%	10	5	50.00%

Improve Housing Stock	Affordable Housing - Homeless Housing - Improve Substandard Housing	CDBG: \$	Housing Code Enforcement/Foreclosed Property Care	Household Housing Unit	4000	2047	51.18%	4000	2938	73.45%
-----------------------	---	----------	---	------------------------	------	------	--------	------	------	--------

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

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

The City of Beloit utilized CDBG funds to address the following objectives and priorities in 2022:

Improve Housing Stock

The following programs, which provided services that improved the housing stock for/of low/moderate income households, were funded:

- City of Beloit - Code Enforcement
- City of Beloit - Housing Rehabilitation Loan Program
- Community Action - Hackett and Merrill Neighborhood Clean-ups
- Community Action – Fresh Start Program
- NeighborWorks Blackhawk Region - Direct Homeownership Assistance

Job Skills

Job skills and training programs received CDBG assistance to provide services to Beloit residents:

- Community Action – Fatherhood Initiative
- Project 16:49 – Robin House
- Stateline Literacy Council – Adult Literacy for Economic Prosperity
- Community Action – Resources Navigator
- Community Action – Merrill Community Center
- Community Action – Fresh Start Program
- Family Services – Community Social Worker
- Stateline Boys and Girls Club – Operation Great Futures

Case Management Services

As part of their programming, the following Beloit CDBG funded programs received funds for case management services:

- Community Action - Fatherhood Initiative
- Community Action - Resources Navigator
- Community Action - Merrill Community Center

- ECHO - Emergency Eviction Prevention
- Family Promise of Greater Beloit - Emergency Shelter and Rental Assistance
- Family Services - Defy Domestic Abuse Beloit
- Family Services - Community Social Worker (NRSA)
- HealthNet - Primary, Dental, and Behavioral Healthcare to Beloit Residents
- Project 16:49 - Robin House
- Retired & Senior Volunteer Program of Rock County - Beloit Senior Volunteers
- The Salvation Army - Supportive Services

Homeless Services:

The following Beloit CDBG funded programs provided assistance to homeless individuals and households or prevented homelessness:

- Beloit Meals on Wheels - Home Delivered Meals
- ECHO - Emergency Eviction Prevention
- Family Promise of Greater Beloit - Emergency shelter and rental assistance
- Family Services - Beloit Domestic Violence Survivor Center
- HealthNet - Primary, Dental, and Behavioral Healthcare to Beloit Residents
- Project 16:49 - Robin House
- The Salvation Army - Supportive Services
- Community Action - Resources Navigator (NRSA)
- Family Services - Community Social Worker (NRSA)
- Retired & Senior Volunteer Program of Rock County - Beloit Senior Volunteers

Affordable Housing:

The following Beloit CDBG funded programs provided assistance that enable more affordable housing:

- NeighborWorks Blackhawk Region - Homebuyer Assistance
- City of Beloit - Housing Rehab Loan Program

- Community Action - Resources Navigator (NRSA)
- Family Services – Community Social Worker (NRSA)

The City of Beloit continued to experience low interest in the Housing Rehabilitation Loan Program in 2022. Additionally, there has been a severe lack of contractors that are willing bid on project RFPs for the Housing Rehab Loan Program. This has been a challenge we are working towards overcoming.

CR-10 - Racial and Ethnic composition of families assisted

Describe the families assisted (including the racial and ethnic status of families assisted). 91.520(a)

	CDBG
White	878
Black or African American	336
Asian	9
American Indian or American Native	1
Native Hawaiian or Other Pacific Islander	2
Total	1,226
Hispanic	280
Not Hispanic	1,119

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

Narrative

The table provided above does not include all racial categories reported for 2022 CDBG beneficiaries. The table below accurately reflects the racial composition of Beloit's 2022 CDBG beneficiaries.

Race	Total 2022
White	878
Black/African American	336

Asian	9
American Indian/Native American	1
Native Hawaiian/Pacific Islander	2
Black/African American & White	75
Asian & White	8
American Indian/Alaskan Native & African American	1
American Indian/Alaskan Native & White	1
All other races not listed	88
Total	1,399

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	857,730	814,419

Table 3 - Resources Made Available

Narrative

The City of Beloit reprogrammed unexpended CDBG-CV1 (\$96,708), CDBG-CV3 (\$25,000), and prior year CDBG funds (\$11,022) to support 2022 CDBG activities.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Census Tract 16 - Hackett	9	10	See below Approximately \$78,000 or 9.8% for each NRSA
Census Tract 18 - Merrill	9	10	See below Approximately \$78,000 or 9.8% for each NRSA

Table 4 – Identify the geographic distribution and location of investments

Narrative

The City of Beloit has utilized two different approaches when referring to the expenditure of CDBG funding. There are two HUD approved Neighborhood Revitalization Strategy Areas that have been identified. In expending the funds, the City of Beloit has allocated \$156,000 or 19.6% of the total 2022 CDBG Budget of \$857,730 for services in the two NRSAs. The remainder of the funds were divided between other City-wide services.

Activities that were undertaken in the NRSAs include the Merrill Community Center (Senior and Youth Programming), Community Action Resources Navigator, Community Action Fresh Start Program, Family Services Community Social Worker, two community clean-up events hosted by Community Action in each of the NRSAs, Direct Homeownership Assistance through NeighborWorks, as well as, Emergency Eviction Prevention through ECHO.

The City has historically offered a Housing Rehabilitation Loan Program which is available to property owners city-wide. After additional public outreach to assess needs in the NRSA neighborhoods, specific incentives were developed for properties within the two NRSAs. The housing stock located in both the 16th and 18th census tracts is among the oldest in the City and also containing the lowest assessed and market values. The City revised its underwriting guidelines for the Housing Rehab Loan program to allow a higher loan-to-value ratio within the two NRSA neighborhoods.

In addition, although the City of Beloit has a Code Enforcement program that completes inspections city wide, CDBG funds are utilized to fund only those conducted in the City's LMI census tracts. In 2022, \$170,000 of the annual grant was allocated for inspection and code enforcement activities.

Although these actions were not funded with CDBG monies, the City of Beloit Police Department completed the following actions to work towards goals identified in the NRSA:

1. Implemented Community Policing Strategies: Neighborhood based, problem oriented, and intelligence led.
2. Enhanced statistical data analysis in order to assist with crime analysis, goals, and strategic development.
3. Improved transparency and communication regarding crime and prevalence of crime.

Leveraging

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

A majority of the agencies that receive CDBG from the City of Beloit actually employ these funds as leverage for other funding sources. As such, there is a complimentary relationship between these federal funds and other funding sources.

Although there are no matching requirements for CDBG, the City and local agencies were able to leverage federal funding with the following resources:

- NeighborWorks Blackhawk Region - HOME, NSP, Federal Home Loan Bank, and private funding to provide down payment assistance to households in the City's targeted neighborhoods.
- Community Action received funding from multiple state and federal sources for its programs. The US Department of Labor Youthbuild programs, YouthBuild USA, Corporation for National and Community Services, State of Wisconsin Department of Children and Families, Community Service Block Grant, Foodshare Employment and Training (FSET), and the Affordable Care Act. In addition, Community Action receives private funding to supplement the Fresh Start, Fatherhood Initiative, and Merrill Community Center. United Way and the FSET programs supported the Fatherhood Initiative. Community Action also received NRSA funding to provide supportive services and assist in an emergency.
- Beloit's Business Community has continued to support local non-profits such as the Merrill Community Center, Community Action, the Stateline Literacy Council, and Project 16:49.
- Blackhawk Region United Way is a large supporter of many of the agencies that receive CDBG.
- The local religious community provided some funding. In addition, emergency shelter space has been provided for homelessness prevention, working closely in conjunction with Family Promise of Greater Beloit.
- The City of Beloit also received HOME funds through the Rock County Consortium. HOME funds are used to complement the City's private Capital Improvement funds, CDBG, and NSP funding for neighborhood improvements and housing rehabilitation initiatives.

- The City also partnered with the non-profit organization ACTS Housing to provide vacant tax foreclosure homes (pre-COVID foreclosures). ACTS works with households to become mortgage-ready and provides rehabilitation support and loans to rehab the property for buyers who want to live in those properties. ACTS Housing is funded entirely with private funding.
- In 2022, there was a total of \$43,477,800 worth of private investment throughout the City of Beloit. In non-LMI areas the total investment was \$40,558,572, and in LMI neighborhoods the total private investment was \$2,919,228. This data was gathered through Building Permits issued.
- In 2022, there was a total of \$954,016 worth of public improvements made in LMI neighborhoods. These projects included improvements to parks located in Census Tracts 17 (\$519,221) and Census Tract 18 (\$120,000), as well as roadway improvements in Census Tract 16 (\$27,500) and road reconstruction and pedestrian crossing improvements in Census Tract 17 (\$287,295).

CR-20 - Affordable Housing 91.520(b)

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

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	193	159
Number of Non-Homeless households to be provided affordable housing units	192	157
Number of Special-Needs households to be provided affordable housing units	0	0
Total	385	316

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	241	214
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	5	5
Number of households supported through Acquisition of Existing Units	0	0
Total	246	219

Table 6 – Number of Households Supported

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

Long-term economic impacts of the COVID-19 pandemic continue to create challenges for LMI residents, resulting in greater hesitancy to take on a loan for housing rehabilitation activities. The ongoing availability of WERA funds throughout 2022 also resulted in lower demand for rental assistance from CDBG-assisted sources. Additionally, the number of households being assisted with rental funds is lower than expected due to the longevity of need. Previously, a household may have only needed one month's aid. However, with the loss of income, many households have requested two or three month's aid.

Discuss how these outcomes will impact future annual action plans.

The needs in the community are shifting and as such, the City of Beloit will modify future annual action plans to incorporate these new priorities. The success of the Forgivable Lead Reduction Loan has ensured a continuance of its existence for the foreseeable future. The City will continue supporting the needs that have been identified and will also support pilot programs to address new needs that have not previously been assisted with CDBG funds.

Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where

information on income by family size is required to determine the eligibility of the activity.

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	774	0
Low-income	384	0
Moderate-income	204	0
Total	1,362	0

Table 7 – Number of Households Served

Narrative Information

CDBG funds in 2022 were used to assist 774 extremely low-income individuals, 384 low-income individuals, 204 moderate-income individuals, and 37 non-LMI residents. Therefore, approximately 97% of Beloit’s 2022 CDBG funds were used to assist LMI residents.

CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)

Evaluate the jurisdiction’s progress in meeting its specific objectives for reducing and ending homelessness through:

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The City of Beloit employed three specific strategies, building upon previously successful efforts, to address homelessness for the 2022 program year.

1. The City supported a Community Social Worker position (CSW) through Family Services. The CSW provided in-depth case management. This may have included the following services: mental health care, financial education, long term supportive services, emergency eviction prevention, and professional health care, among others.
2. Community Action's Resources Navigator (RN) position received continued support. The RN not only provided residents with information, but also provided support to them as they worked towards self-sufficiency.

3. Multiple local agencies received CDBG awards which were utilized to offer services and facilities for homeless persons in the City. In 2022, the following agencies received assistance so that homeless persons or persons at risk of homelessness could have resources: Beloit Meals on Wheels, Community Action, ECHO, Family Promise of Greater Beloit, Family Services of Southern Wisconsin and Northern Illinois, HealthNet, Project 16:49, Retired and Senior Volunteer Program of Rock County, and the Salvation Army.

Additionally, City staff actively participates in both the Homeless Intervention Task Force (HITF) and the Beloit Area Task Force on Homelessness. Both of these organizations work towards eliminating community silos and coordinating with each other to provide efficient services to Beloit residents.

Addressing the emergency shelter and transitional housing needs of homeless persons

The City of Beloit has determined that there are three key components of a successful transition from homelessness to housed:

1. Long Term Case Management
2. Supportive Housing
3. Client Advocacy

As such, the City has continued to provide CDBG support to agencies that offer the aforementioned components hand-in-hand with facilities for homeless persons in Beloit.

Through CDBG, the City of Beloit was able to provide funding and support to Project 16:49's Robin House Transitional Living Program. Unaccompanied, homeless female students between the ages of 17-21 are able to access a safe place to reside. While living at the Robin House, they are able to work towards completing their high school education and transition to independent living. Case managers address key issues with the residents during their stay: education, housing, employment/income, health, and social-emotional well being. Through this work, residents are offered a safe place to heal from any past trauma and become a more well-rounded individual prepared for independent living. This program has been so successful that Project 16:49 was able to open a second transitional living program in Janesville for male students in 2019.

The Defy Domestic Abuse Beloit program received funding for case management. Receiving not only emergency short term shelter, survivors also are able to access on-going case management after leaving the shelter.

As part of the work being completed under the NRSA, Community Action and Family Services were both able to offer assistance regarding emergency shelter (motel/hotel vouchers) to families in need through the Resources Navigator and Community Social Worker positions.

In 2022, Family Promise of Greater Beloit was able to expand their services to provide emergency shelter to additional families by establishing a new permanent location located at 1006 Bluff Street, within one of Beloit's NRSA neighborhoods. In 2022 they were able to double the number of families they can serve at one time, and maintain a single static site to offer additional stability to the families they serve. In addition to providing emergency overnight shelter, Family Promise of Greater Beloit continued to offer emergency eviction prevention assistance and first month/security deposit assistance for clients. They continued their "Keys to a Better Tenancy" program to teach participants how to be more desirable tenants.

Beyond CDBG, the City's Housing Authority (BHA) provides Section 8 and Public Housing for eligible applicants. BHA provides a preference if an applicant is a "Graduate of a Transitional Housing Program within the last six months". As a result, transitional housing directors and the BHA have established a good working relationship to continue the cycle of stable housing for transitional housing participants.

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

Homelessness prevention cont. 2

In addition, tenants who are enrolled in the Section 8 and Public Housing units are eligible to participate in the Family Self-Sufficiency program. At the end of the FSS program, tenants will have successfully increased their earned income, graduated from welfare programs, and embraced self-sufficiency. Clients will work with one, full-time case manager to establish five year employment and/or educational goals.

Homelessness prevention cont. 1

The Beloit Housing Authority provides individuals and families the following resources to avoid homelessness:

- 131 public housing units
- 598 Housing Vouchers

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

The transition from homelessness to permanent housing is far more complicated than simply finding safe and sanitary housing. One of the most impactful strategies has been implemented in the long-term case management and follow-up for clients through the following approaches:

1. Staff support for the Defy Domestic Abuse Beloit program. Survivors were able to access food, clothing, and support groups during their stay in the shelter. Staff also is available for assistance after survivors exited the shelter.
2. ECHO is able to offer up to three month's worth of rental assistance, security deposit assistance, or utility assistance.
3. Family Promise of Greater Beloit received staff support funding in addition to emergency eviction prevention and security deposit assistance. As part of their program, FPGB has also introduced an educational component, "Keys to Good Tenancy" with the goal of providing information to beneficiaries on ways to be better and more desirable tenants.
4. The City is an active member of the Homeless Intervention Task Force and attends monthly meetings. Members of the Rock County Continuum of Care are members and share updates and organizational activity with the members.
5. The City also began attending the newly formed Beloit Area Task Force on Homelessness (BATFoH) group, which meets monthly. This group is comprised of representatives from local service providers, local governments, and the school districts. This has helped in identifying gaps in the housing assistance cycle, and creating a better system of collaboration amongst local agencies.

The NRSAs have permitted Community Action and Family Services to provide in-depth assistance to the highest priority low-moderate income households in the City's most vulnerable neighborhoods. In addition to education, the Community Social Worker and Resources Navigator positions were able to offer security deposits, emergency eviction prevention, and utility assistance to avoid homelessness. The CSW and RN provided support before, during, and after homelessness for these beneficiaries. This personalized one-on-one support has provided clients the opportunity to identify possible triggers and causes of homelessness beforehand.

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

Actions taken to address the needs of public housing

The Beloit Housing Authority owns and manages 131 public housing units throughout the City of Beloit. The BHA's efforts strengthen neighborhoods, empower families, and support local achievement. Low to moderate-income families are offered the opportunity to obtain affordable housing, employment and job training, and case management.

Actions taken to address the needs of public housing cont.

The BHA meets residents' needs by providing various programs. The following opportunities were available to public housing residents during 2022: Family Self-Sufficiency Program (FSS) - Increase earned income and reduce the dependency on welfare assistance and rental subsidies. The term of this program is usually five years but can be extended for good cause if approved by the BHA. Resident Opportunities and Self-Sufficiency (ROSS) - Connects residents with supportive services and activities that support their goal of economic independence and housing self-sufficiency. Housing Choice Voucher Program - The BHA administered 598 Housing Choice Vouchers. Through this program rent can be subsidized for eligible participants at participating rental units. The Beloit Housing Authority advertised available programs through local newspapers and radio stations. BHA staff have attended local senior, health, and family events to spread information about these opportunities.

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

The BHA encourages residents to become involved with a resident council or the governing board (Community Development Authority). Residents are able to offer insight on changes to the lease, ACOP (rules of public housing program), Admin Plan (rules of Section 8 program), Annual Plan, and Five-Year Plan.

Community Development Authority Plans and implements economic redevelopment and housing initiatives; oversees the operations of the public housing office.

Actions taken to encourage public housing residents to become more involved cont.

There are at three ways in which residents are encouraged to participate in homeownership. The first of which is the aforementioned Family Self-Sufficiency Program. Any eligible public housing resident or housing choice voucher participant can apply to the FSS program. Members of

the FSS program are encouraged to determine their own educational and career goals. As the member's income increases, their portion of the rent increases accordingly. The BHA will deposit the difference in the rental amount in an escrow account that the FSS member can use for a down payment on a home upon successful their portion of the rent increases accordingly. The BHA will deposit the difference in the rental amount in an escrow account what is disbursed to the participant upon successful completion of the program. The second approach towards homeownership is a well-established relationship between the BHA and NeighborWorks Blackhawk Region. Residents are able to access education, information, and financial assistance. NeighborWorks Blackhawk Region is able to offer down payment and closing cost assistance to eligible households. Finally, ACTS Housing, a non-profit based out of Milwaukee, has established an office in Beloit. BHA residents are encouraged to work with ACTS, and in fact, in 2019 a BHA resident became the first successful FSS graduate to purchase a home through ACTS Housing.

Actions taken to provide assistance to troubled PHAs

BHA's Special Programs Administrator works one-on-one with participants to assist them in meeting their identified goals and objectives and reducing their dependence on social service programs. In addition, BHA's ROSS Coordinator also works with public housing residents to link them with needed services to increase their economic dependence.

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

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

In 2022, in an effort to promote affordable housing, the City of Beloit adopted an ordinance amending the minimum dwelling standards in the Zoning Ordinance to allow homes to now be less than 25 feet wide and for the gross floor area of single-family dwellings and duplexes to be less than 1,000 square feet if approved through the PUD process. These are commonly referred to as "tiny homes."

In addition to flexibility built into the Zoning Ordinance, the City's Subdivision Ordinance allows cluster development, which is a residential subdivision or condominium development in which the lots are allowed to be smaller than otherwise required, but in which the overall (gross) density cannot exceed the maximum density limits for the underlying zoning district. Smaller lot sizes within a cluster subdivision or condominium development allow for a corresponding increase in common open space. Cluster development encourages sensitivity toward

natural landscape features, preserves open space, and offers economies in the provision of utilities and public services. Additionally, the same ordinance described above related to “tiny homes” also amended the subdivision ordinance to eliminate the minimum lot size requirement in a cluster development.

During 2022, the City issued permits for 20 new single-family dwellings and a permit for an 83-unit multifamily building for a total of 103 new dwelling units. Many of the single-family permits were in Eagles Ridge Subdivision, with the remaining scattered throughout the City on vacant lots, many of which were platted years ago. The multifamily building is part of the at Wright & Wagner Lofts located at 206 W. Grand Avenue.

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

The City utilized a multi-pronged approach to meeting underserved needs in 2022. The Division collaborated with local stakeholders, nonprofits, community leaders, businesses, and other interested parties to identify community needs and the strategies to be utilized.

Although sufficient funding is an obstacle to fully meeting underserved needs, the City of Beloit is strategic in allocation of resources in order to make the most with the limited resources awarded. In 2022, the City of Beloit supported the following activities and/or funded the following programs to address homelessness, transportation, affordable and sanitary housing, individual level case management, and employment training.:

1. Beloit Meals on Wheels - Ensure that seniors and/or disabled persons are able to remain homeowners as long as possible
2. Stateline Literacy Council - The support of adult literacy for persons with limited English proficiency to increase job skills and employability
3. Project 16:49 - Transitional Living Support for unaccompanied youth in Rock County
4. HealthNet - This organization provides medical, dental and behavioral healthcare at a rate clients can afford. This results in clients having the money necessary for rent or other financial needs.
5. Family Services - This organization offered case management for homeless survivors of domestic violence, and a NRSA specific initiative to provide in-depth case management for residents of one of Beloit's NRSA neighborhoods.
6. Family Promise of Greater Beloit - Emergency shelter, eviction prevention, and rental assistance
7. ECHO - Emergency eviction prevention
8. Community Action - This organization provided four different programs as a result of CDBG funding. The Fatherhood Initiative, Fresh Start program, a NRSA specific Resources Navigator, and the Merrill Community Center youth and senior programs.

9. City provided Housing Rehabilitation Loans to low-moderate income persons.
10. NeighborWorks Blackhawk Region - Down payment assistance, closing cost assistance, or low-dollar first mortgages.
11. Retired & Senior Volunteer Program - Beloit Seniors have access to free transportation to complete grocery shopping, attend doctor appointments, and other vital appointments.
12. Salvation Army - This program offered Emergency Eviction Prevention and rental assistance to avoid homelessness
13. Through HOME, acquisition, rehab, demo, reconstruction, and resale at Fair Market Value of housing units.
14. The Beloit Housing Authority operates a Family Self-Sufficiency program for Public Housing and Section 8 participants. This program provides training opportunities and intensive case management with the goal of increasing the family's income and reducing their dependence on public assistance programs.
15. Legal Action of Wisconsin worked closely with the City of Beloit to understand the needs of low-moderate income renters with regard to housing conditions. The organization assigned an attorney specifically to Beloit to work with residents who were experiencing inadequate or unsafe conditions in rental housing. The City was able to provide CV1 funding to Legal Action to provide legal assistance to prevent evictions.

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

The City’s Housing Rehabilitation Loan Program (HRLP) performs rehab work as “presumed lead” on all projects in/on pre-1978 housing. All projects are performed utilizing lead safe work practices and qualified lead certified contractors. All projects are monitored and inspected by the City’s Housing Rehab Construction Specialist or our Project Engineer, both of whom are lead certified.

Rock County Health Department refers residents and landlords with residential property within the City of Beloit that have had a child under 6 years old with elevated blood levels. HRLP staff work with the landlord or homeowner to identify the lead based paint hazard within the property, and provides the property owner with a loan, forgivable loan, deferred loan, or combination of the three in order to reduce or eliminate the lead based paint hazard. However, with the existence of DHS’s “Lead Safe Homes” program, the Rock County Health Department referrals were submitted to the state for that grant funding rather than referred to the City’s HRLP program. Therefore, only two households were referred to our program from Rock County Health Department in 2022. The Wisconsin Department of Health Services has a "Lead Safe Homes" program that offers repairs to households receiving Medicaid or BadgerCare Plus.

During 2022 the City’s Housing Rehab Loan Program (HRLP) staff and the Division of Water Resources worked together on developing a program to eliminate private lead service lines used to carry drinking water to residential properties in anticipation of a grant provided through the DNR’s

Safe Drinking Water Loan Program. The City launched the program in 2022, and served one property which was located within a NRSA neighborhood. Although this project does not address lead based paint, we believe it is an important program that will reduce additional exposure to lead within our community. The Housing Rehab Loan Program staff will administer the program and will work with households to obtain an HRLP loan if needed to complete the project or address other issues within their home. Now that the program has been established, additional outreach will take place in 2023 to increase program participation.

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

The City of Beloit has undertaken various actions to reduce the number of poverty-level families. Through the Beloit Housing Authority, families have access to the Family Self-Sufficiency Program. This provides individual case management to enrollees to establish goals related to employment, education, finances, and homeownership. Additionally, the BHA enforces HUD's policy requiring public housing tenants to perform eight hours of community service per month (when the participating adult does not have a disability, is unemployed, and is not participating in any self-sufficiency activities). Residents are able to learn new skills through this practice.

The City allocated CDBG public service grants to the following agencies to provide services that will work towards reducing the number of poverty-level families:

- Community Action received funding for the Fatherhood Initiative, and Fresh Start programs. Through the Fatherhood program, participants gain employment through case management and program agreements with employers. The Fresh Start program at Community Action serves youth ages 16 - 24 and helps them to not only complete secondary education, but provides job training certification and skills to help provide them pathways for a brighter future.
- Beloit Meals on Wheels provided daily, nutritional meals to homebound seniors or individuals with disabilities. Clients are able to stay in their homes safely for a longer period of time. This has the potential to reduce a financial burden on their families.
- ECHO provided emergency eviction prevention services. This prevented the process of starting over and over again for beneficiaries thus permitting a modicum of stability for low-moderate income households.
- Family Services provided services and case management for homeless survivors of domestic violence.
- HealthNet received CDBG funding to assist Beloit residents with primary medical, dental and behavioral health care. Medical expenses are a major contributing source of debt for low-moderate income residents. Having access to this care prevented unnecessary trips to the Emergency Room or Emergency Dentist, and facilitated access to mental health services for uninsured residents

- Project 16:49 provided transitional housing opportunities for unaccompanied youth. Those youth were able to have a safe place to live while they finished high school or begin their path to higher education.
- Stateline Literacy Council taught English to individuals with Limited English Proficiency. This permitted greater economic opportunities to residents.
- Salvation Army provided rental assistance to eligible residents. This prevented homelessness and provided both familial and neighborhood stabilization.
- NeighborWorks provided affordable first-time Homebuyer Mortgages as well as down-payment/closing cost assistance to residents.

The Beloit Housing Authority has also undertaken various actions to reduce the number of poverty-level families. Through the Beloit Housing Authority, families have access to the Family Self-Sufficiency Program. This provides individual case management to enrollees to establish goals related to employment, education, finances, and homeownership. Additionally, the BHA enforces HUD's policy requiring public housing tenants to perform eight hours of community service per month (when the participating adult does not have a disability, is unemployed, and is not participating in any self-sufficiency activities). Residents are able to learn new skills through this practice.

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

The City of Beloit is developing institutional structure that includes private industry, non-profit organizations, and public institutions to implement its housing and community development plan. As agency silos have been identified as an impediment to successfully serving the needs of Beloit residents, this structure has been improved immensely over 2022. There are four imperative efforts that the City is has implemented to develop and enhance coordination which are described below:

- **City Membership in the Homeless Intervention Task Force (HITF)** - This group consists of agencies and local government representatives from Rock and Walworth Counties. There are at least six meetings a year to share new resources, news, and updates relating to homelessness and other related services. This is also the Continuum of Care for Rock County so all City of Beloit CDBG Subrecipients must participate and coordinate with other agencies in the area.
- **City Participation in Beloit Task Force on Homelessness (BATFoH)** - This group consists of agencies, private industry representatives, government representatives that are focused on ending homelessness within the City of Beloit.
- **Rock County HOME Consortium** - The consortium enhances coordination between the City of Beloit and City of Janesville, specifically in regards to new, single family construction and rehab/resale projects.
- **City CDBG Funding of NRSA Community Social Worker and Resources Navigator** - These positions, funded through the two designated

NRSAs, were established to be "the link" for residents and requested services. The goal was to have one or two dedicated staff persons in the community that Beloit residents could turn to for questions and information when help was needed. This can include, but is not limited to: mental health counseling, financial education, rental assistance, etc.

In 2019, the City moved the Public Transit Division from the Department of Public Work to the Community Development Department. This not only allows for much more input from the public and service provider agencies on Transit Development Plans (TDP), but also allows the Transit Division to consider the transportation needs outlined in the Consolidated Plan, Neighborhood Revitalization Strategy Area (NRSA) Plan, and Analysis of Impediments to Fair Housing (AI). In 2020 and 2021, Beloit Transit's fixed route system was completely revised to better serve the City's low-moderate income census tracts, community centers, schools, and employment corridors. In 2022 the city made additional minor modifications to the routes to better serve the public.

In addition, the City has placed informational brochures in the main lobby of City Hall relevant to homeownership opportunities, weatherization services, senior services, and others.

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

Public Housing and Section 8 participants are directly linked with Federal, State, and local service agencies through the Family Self-Sufficiency Program. These connections provide a variety of opportunities and resources to assist families in becoming more self-sufficient. A full time FSS coordinator is employed by the BHA to act as a liaison to link the agencies with the participants.

City Staff participates in the Homeless Intervention Task Force, which is composed of service agencies through-out Rock and Walworth Counties. Public Housing agencies are also members.

In 2020, the Beloit Area Task Force on Homelessness (BATFoH) was created and continues to work towards ending homelessness specifically within the City of Beloit. Service agencies, City Staff, and other relevant organizations are members of this group. As Beloit's struggles differ from other cities within Rock and Walworth Counties, this permits a more specialized approach than HITF. In 2022, the group continued working with the City on addressing affordable housing needs.

The City has also made efforts to increase access to homeownership opportunities. This can be seen through partnerships with Community Action, NeighborWorks, ACTS Housing, and the Purchase/Rehab/Resale program that is being operated under the NRSA's efforts.

City Code Enforcement officials coordinate with the appropriate service agencies when they encounter situations outside of their realm on expertise. For example, in the event of hoarding or seniors unable to care for themselves, Code officials will contact Rock County's Aging and Disability Resource Center (ADRC).

The City of Beloit and City of Janesville both have Section 3 Plans with similar procedures, universal forms, and reports that can be utilized by Section 3 businesses and Section 3 residents in both communities. Due to the close proximity of the two cities, many contractors and residents work in both communities.

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

The City's Analysis of Impediments to Fair Housing was completed in 2019. The Equal Opportunities Commission (EOC) began strategizing goals and action steps to address impediments identified in the Analysis. Due to high turnover of EOC members in 2021, significant efforts were made in 2022 to recruit new members. Recruitment efforts were intentional about ensuring that EOC membership reflects the diversity of the community related to race, gender, age and other protected classes. Five (5) new members were appointed to the EOC in 2022, with only one vacancy remaining to be filled in 2023.

Actions taken in 2022 include the following:

- A Beloit College through the Duffy Partnership Program completed a semester-long internship to update and develop new outreach materials and suggested outreach events for use by the EOC in 2023.
- The City updated and distributed materials related to Fair Housing during a housing fair hosted in one of the NRSA neighborhoods.
- Legal Action of Wisconsin hosted a series for residents to educate about landlord/tenant rights and resources available for LMI residents.
- The City funded Legal Action of Wisconsin to assist households experiencing evictions.
- The City partnered with Community Action, ACTS Housing, and NeighborWorks Blackhawk Region to host a "Pathways to Homeownership" event in the Merrill neighborhood (NRSA). Speakers at this event provided information about resources for first-time homebuyers, housing rehab loan funds available, Fair Housing, and the City's Equal Opportunities Commission (EOC).

In addition to working towards action steps, the EOC also administers and enforces the City's local Fair Housing Ordinance. Fair Housing complaints are received by City Staff, referred to an Investigator, and conciliation/mediation is facilitated if necessary. The EOC will hear

administrative appeals regarding determinations of probable cause and conducts full hearings when needed to determine whether housing discrimination has occurred. The EOC has the authority to impose fines and award damages.

In 2022, the City received one complaint. The case was found to have no probable cause for Fair Housing discrimination, but was referred to Legal Action of Wisconsin to address the underlying landlord/tenant issues.

CR-40 - Monitoring 91.220 and 91.230

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

As part of the CDBG subrecipient application process, applicants are required to document the manner in which their proposed program will comply with National Objectives, Eligible Project Types, and local funding priorities. City staff review every application and project description to ensure that the project, if funded, will further the plan.

As a condition of receiving the CDBG award, subrecipients understand and agree to quarterly reporting to the City in regards to their services. During the quarterly reviews, city staff monitors activities the subrecipients have taken thus far and addresses any compliance issues that arise. All draw requests must include back-up documentation which is also reviewed by City staff before approving reimbursements for CDBG funded activities.

The City also conducts on-site annual monitoring of all its subrecipients. During the monitoring visit, staff will review client and financial files to ensure long term compliance with CDBG requirements. In 2022, monitoring was conducted to review subrecipient for PY2021 and completed CDBG-CV activities.

During the most recent Consolidated Planning process it was determined that there was less of a need for large economic development loans and more of a need for smaller business loans. The City was able to offer CDBG funding to WWBIC, to provide loans and grants to small businesses and micro-enterprises through the CARES funding as well as our regular, annual CDBG award.

With the the City of Beloit's most recent Consolidated Plan, we expanded our approach to public input. In addition to hosting traditional public meetings at City owned locations and providing surveys, City staff conducted and increased and comprehensive community outreach through attending community events. This has expanded the demographics of individuals that have contributed to the planning process. In addition, City staff has begun holding and attending public outreach meetings each year to understand gaps in service and the changing needs in the community during the span of the Consolidated Plan.

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

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

When the CAPER is available for comment, the City of Beloit publishes a notice in the Beloit Daily News and the City of Beloit website. There is a thirty (30) day public review period, a public hearing is held, and a presentation on CDBG accomplishments is presented before the Community Development Authority (CDA) Board and City Council. Any public comments received during the public review period, public hearing, or presentation are incorporated into the CAPER before being submitted.

In 2023, the public review period was held from February 28 to March 28. City Council held a public hearing on March 20, 2023 followed by a presentation of 2022 CDBG accomplishments. A second presentation of 2022 CDBG accomplishments was held during the regularly scheduled Community Development Authority (CDA) Board meeting on March 22, 2023. The final CAPER was submitted to HUD on March 31, 2023. There were no comments received during the Citizen Review Period.

CR-45 - CDBG 91.520(c)

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

The City of Beloit does not foresee many substantial changes to our objectives. At the core, we are committed to providing safe, sanitary housing to residents, assist/prevent homelessness, create/retain jobs, increase property values/improve housing stock, and assisting special needs populations. This being said, the City recognizes that the methods for meeting these goals evolve and morph over time as well as current life events.

Although transportation, quality/affordable childcare, and affordable housing continue to be pressing concerns, ensuring housing, employment retention, and food access during the pandemic have been brought to the front lines in terms of a high need. A higher priority may be assigned to programs or activities that aim to address these needs.

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

No

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

CR-45 - CDBG 91.520(c)

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

The City of Beloit does not foresee many substantial changes to our objectives. At the core, we are committed to providing safe, sanitary housing to residents, assist/prevent homelessness, create/retain jobs, increase property values/improve housing stock, and assisting special needs populations. This being said, the City recognizes that the methods for meeting these goals evolve and morph over time as well as current life events.

Although transportation, quality/affordable childcare, and affordable housing continue to be pressing concerns, ensuring housing, employment retainment, and food access during the pandemic have been brought to the front lines in terms of a high need. A higher priority may be assigned to programs or activities that aim to address these needs.

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

No

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

CR-58 – Section 3

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

Total Labor Hours	CDBG	HOME	ESG	HOPWA	HTF
Total Number of Activities	0	0	0	0	0
Total Labor Hours	0				
Total Section 3 Worker Hours	0				
Total Targeted Section 3 Worker Hours	0				

Table 8 – Total Labor Hours

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers	11				
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.	11				
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.	11				
Technical assistance to help Section 3 business concerns understand and bid on contracts.					
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.	115				
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.	106				
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.	115				
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					

Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

Table 9 – Qualitative Efforts - Number of Activities by Program

Narrative

- All of the Request for Proposals (RFP) have Section 3 information and certification documents in them.
- All RFPs are sent to the YouthBuild Program in our community (Community Action's Fresh Start Program).
- All RFPs are sent to the Beloit Housing Authority. The BHA is the Public Housing Authority in the community.
- All contracts require businesses to complete the Section 3 certification document indicating whether they are a Section 3 business concern.
- All construction projects over \$200,000 had Section 3 posters posted at the job site.
- Attempted to recruit low-income residents through: local advertising media, signs prominently displayed at the project site, contacts with community organizations and public or private agencies operating within the metropolitan area (or 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 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.