



PUBLIC NOTICE & AGENDA
BELOIT COMMUNITY DEVELOPMENT AUTHORITY
Beloit Public Library - 605 Eclipse Boulevard
Community Room
4:30 PM
Wednesday, August 23, 2023

1. CALL TO ORDER AND ROLL CALL
2. MINUTES
 - 2.a. Consideration of the minutes of the June 28, 2023 Community Development Authority meeting
[Attachment](#)
3. PUBLIC COMMENT
4. BELOIT HOUSING AUTHORITY
 - 4.a. Presentation of the June Activity Report (Cole)
[Attachment](#)
 - 4.b. Presentation of the July Activity Report (Cole)
[Attachment](#)
 - 4.c. Presentation of the May Financial Report (Cole)
[Attachment](#)
 - 4.d. Presentation of the June Financial Report (Cole)
[Attachment](#)
5. COMMUNITY AND HOUSING SERVICES
No business to discuss.
6. SUCH OTHER MATTERS AS AUTHORIZED BY LAW
No business to discuss.
7. ADJOURNMENT
The Community Development Authority will adjourn into a workshop to hear presentations from Community Development Block Grant (CDBG) Applicants for the 2024 CDBG funding cycle (Downing)
 - 7.a. 2024 Community Development Block Grant (CDBG) Applications
[2024 CDBG Application Summary Spreadsheet](#)
[Beloit City Wide Youth Softball - 2024 CDBG Application](#)

Beloit Meals on Wheels - 2024 CDBG Application
Family Promise of Greater Beloit - 2024 CDBG Application
HealthNet - 2024 CDBG Application
Messiah Lutheran Food Pantry - 2024 CDBG Application
Project 16:49 - 2024 CDBG Application
Stateline Literacy Council - 2024 CDBG Application
The Salvation Army - 2024 CDBG Application
The Youth Unite - 2024 CDBG Application
ECHO - 2024 CDBG Application
Family Services Defy Domestic Abuse Beloit - 2024 CDBG Application
(NRSA) ECHO - 2024 CDBG Application
(NRSA) Family Services Neighborhood Resilience Project - 2024 CDBG Application
(NRSA) Community Action Merrill Community Center - 2024 CDBG Application
(NRSA) Community Action Resources Navigator - 2024 CDBG Application
(NRSA) Legal Action of WI - 2024 CDBG Application
(NRSA) Pearl Transit Corp - 2024 CDBG Application
Wisconsin Women's Business Initiative Corporation (WWBIC) - 2024 CDBG Application

** 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, June 28, 2023

1. CALL TO ORDER AND ROLL CALL

Meeting was called to order by Vice Chairperson Jasmine Hartke at 4:40 p.m. Councilor Leavy, Councilor Forbeck, and Commissioner Bullock were present. Chairperson Gorman arrived at 4:42 pm.

2. MINUTES

2.a. Consideration of the minutes of the May 24, 2023 Community Development Authority meeting

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

3. PUBLIC COMMENT

Allison Creekmur submitted a letter to the CDA recommending that retaliation by landlords for submitting a complaint to the City be considered a local concern.

Steve Howland spoke about the need for collaboration and communication between Beloit City Council, City staff, area service providers, and Beloit Housing Authority to evaluate and address affordable housing needs in Beloit. He recommended that the City assess the capacity of organizations to carry out programs, and use metrics to measure overall success and impact of programs funded to address overall community needs. Due to the limited amount of CDBG funding available, he also encouraged the City to engage additional stakeholders such as the school district and Blackhawk Tech to come up with more comprehensive solutions to affordable housing.

Jody Wittnebel, who was representing The Castle, spoke in favor of programming that involves music and uses music as a way to bring people together. She shared information about the positive impacts of music on behavioral and brain development in children as long-term benefits of investing in music-based programming.

Heather Lux, who was representing Wisconsin Women's Business Initiative Corporation (WWBIC), expressed an ongoing need for support to small business and microenterprises. The number of start-up businesses nationwide has increased in the past two years, and businesses are working to recover and expand after the COVID-19 pandemic. She said that

support is specifically needed for underrepresented and low- to moderate-income (LMI) business owners and workers.

Debbie Fisher, who is the Director of Youth2Youth 4 Change as well as a member of the leadership team for the Beloit Area Task Force on Homelessness (BATFoH), expressed support for having housing included in the recommended CDBG priorities. She explained that she is involved with doing homeless checks, and the numbers are increasing. She advocated for homelessness, affordable housing, and Fair Housing to remain priorities for funding.

John Pfleiderer, Co-Executive Director of Family Services, shared that the highest priority for participants in their Neighborhood Resilience Program is to keep families housed. Eviction creates huge barriers to future housing for LMI residents, so eviction prevention is very important. He also encouraged that we as a community be thoughtful about the process of gentrification, and recognize important of diversity and equity. He also agreed with Steve Howland's statements about thinking of ways that we can maximize the impact of the overall CDBG program.

Whitney Klein, who is a school social worker and a member of the Beloit Area Task Force on Homelessness (BATFoH), advocated for homeless services and needs. She voiced a need for vouchers, immediate housing and assistance in finding housing and resources. She also spoke about the need for transitional housing, with smaller homes as an option, to help families transition from the shelter to stable, permanent housing. Additionally, she advocated for mental health services, particularly for youth as well as services that are offered in Spanish.

Michelle Loy is a coach at the middle school, and expressed that youth need to be a priority. She emphasized the importance of visibility and outreach to engage families and educate about services available, and to hold diverse events that can help mend relationships and include everyone in the community.

Brian Elliot, who was representing the Beloit Youth City-Wide Softball program advocated for programming and the youth of Beloit. He shared that their organization largely serves kids in the Merrill and Hackett neighborhoods, and that they serve approximately 500 kids each year. They started a league for older kids this last year to expand the program based on demand. He shared that they intent to apply for CDBG funding to help reach more kids, and continue to offer their services at no cost. They also want to partner with Community Action and the Merrill Community Center to add an educational component to their programming.

4. BELOIT HOUSING AUTHORITY

4.a. Presentation of the May Activity Report 2023

The May Activity Report was presented by Clinton Cole, Beloit Housing Authority Director. Councilor Forbeck asked for clarification on the definition of initial inspections. Mr. Cole explained the initial inspections are completed prior to new

move-ins for Section 8 participants to ensure that the unit meet HUD's Housing Quality Standards.

4.b. Presentation of the First Quarter 2023 Financial Report

The first quarter 2023 financial report was presented by Clinton Cole, Beloit Housing Authority Director. Commissioner Bullock asked if BHA has a contract with a pest control company for regular treatments. Clint stated that there is no contract for regular treatment, but rather that pest control services are provided on an as-needed basis.

4.c. Presentation of the April Financial Report

The April financial report was presented by Clinton Cole, Beloit Housing Authority Director. Councilor Forbeck questioned the operational expenses for 240 Portland Avenue. Clint stated he is waiting for guidance from HUD on what may be done with the property. The expenses incurred are primarily for the utilities, which must be kept on to maintain the unit.

4.d. Consideration of Resolution 2023-08 Awarding Contract for Roof Replacement at Phase 1 Public Housing Sites

The staff report and Resolution 2023-08 were presented by Clinton Cole, Beloit Housing Authority Director. Councilor Forbeck asked how the remaining \$5,309 in costs for the roof replacement beyond what was budgeted in the 2023 Capital Fund budget would be covered. Clint stated there were roof replacement funds left over from the 2022 Capital Fund budget that will cover the overage. Motion was made by Councilor Forbeck to approve Resolution 2023-08, seconded by Vice Chairperson Hartke. Motion was approved, voice vote (5-0).

4.e. Consideration of Resolution 2023-09 Awarding Contract for Gutter and Soffit Replacement at Phase 2 Public Housing Sites

The staff report and Resolution 2023-09 were presented by Clinton Cole, Beloit Housing Authority Director. Motion was made by Councilor Forbeck to approve Resolution 2023-09, seconded by Vice Chairperson Hartke. Motion was approved, voice vote (5-0).

4.f. Consideration of Resolution 2023-10 Approving BHA's HUD Emergency Safety and Security Grant (ESSG) Application

The staff report and Resolution 2023-10 were presented by Clinton Cole, Beloit Housing Authority Director. Motion was made by Councilor Forbeck to approve Resolution 2023-10, seconded by Vice Chairperson Hartke. Motion was approved, voice vote (5-0).

5. **COMMUNITY AND HOUSING SERVICES**

5.a. **Public Hearing and Consideration of Resolution 2023-11 recommending approval of the 2024 Community Development Block Grant (CDBG) Local Funding Priorities (Downing)**

Teri Downing, Deputy Community Development Director, presented an overview of the Community Development Block Grant local funding requirement process, and action plan and consolidated plan.

Chairperson Gorman opened and closed the public hearing.

Chairperson Gorman requested public service activities to be defined for the public. Ms. Downing explained public service activities are activities that directly benefit low to moderate income households. Councilor Forbeck requested that next year if there could be a line item listing where the remaining funds are allocated. Ms. Downing explained the remaining balance is listed in the budget every year, and she does a presentation on the City program and where the funding goes.

Councilor Leavy asked for clarification whether an organization can apply for both CDBG funding and NRSA funding. Ms. McBride stated as long as the activity and agency both qualify, they can apply for both. Councilor Leavy also inquired about agencies that are not in a NRSA neighborhood, but still provide services to individuals who reside in the NRSA neighborhoods. Ms. Downing stated it is a case-by-case basis.

Councilor Forbeck asked if there are programs that focus on mental health services. Ms. Downing stated Family Services, Beloit Area Community Health System, as well as HealthNet have applied in the past.

Councilor Leavy asked the advantages between identifying priorities and having no priorities. Ms. Downing stated that by listing no priorities, staff has no idea what applications will be received. Chairperson Gorman proposed adding mental health and subtracting childcare for now. Motion to approve Resolution 2023-11 was made by Councilor Forbeck, seconded by Vice Chairperson Hartke. Motion was approved, voice vote (5-0).

5.b. **Consideration of Resolution 2023-12 recommending the award of HOME investment Partnership Program (HOME) funds to Community Action, Inc.**

Julie Christensen, Community Development Director, presented the staff report and recommendation.

Vice Chairperson Hartke asked if it was possible to build tiny homes. Ms. Christensen stated tiny homes are allowed if done as part of planned unit development. Motion was made by Councilor Leavy to approve Resolution 2023-12, seconded by Vice Chairperson Hartke. Motion was approved, voice vote (5-0).

6. **SUCH OTHER MATTERS AS AUTHORIZED BY LAW**

No business to discuss.

7. **ADJOURNMENT**

Motion was made by Councilor Leavy, seconded by Vice Chairperson Hartke to adjourn the meeting at 6: 24 p.m. Motion was approved, voice vote (5-0).

Philip Gorman, Chairperson

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	4a		
Topic:	June Activity Report		
Date:	August 23, 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 was one public housing vacancy. Eight annual and 11 interim certifications were completed. 13 public housing inspections were conducted.

Housing Choice Voucher (Section 8):
434 vouchers were housed on June 30, 2023, and six port-in vouchers were administered. The Housing Specialists completed 38 annual and 20 interim recertifications during this reporting period. 44 Housing Quality Standards (HQS) inspections were completed.

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

June 2023 Activity Report

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

PUBLIC HOUSING

Total Public Housing Units	131 Units	
Occupied on 6/30/2023	130 Units	99% Occupancy
Vacancies on 6/30/2023	1 Unit	1% Vacancy
Vacancies by Type		
Elderly	0 Units	100% Occupancy
Family	1 Unit	99% Occupancy

Public Housing Inspections

11 annual inspections and two move-in inspections were completed during this reporting period.

Public Housing Activities

Annual Recertifications	8
Interim Recertifications	11
Tenant notices to Vacate *Not due to eviction	0
New Tenants	2
Transfers	0
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 6/30/2023	434 Vouchers
Total Portable Vouchers Paid	0 Vouchers
Total Port Out*	0 Vouchers
Total Port In*	6 Vouchers
June HCV HAP Funds Received	\$250,522
June HCV HAP Funds Expended	\$272,330
Current Per Unit Cost (PUC)	\$627

* 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 31 annual inspections, four reinspections, and nine initial inspections during this reporting period.

Section 8 Activities

New Participants	10
Annual Recertifications	38
Interim Recertifications	20
Abatements	0
Unit Transfers	2
Possible Program Violations	0
End of Program	2
Port Ins	0
Port Outs	0

Section 8 Briefings

Number Notified	0
Number Briefed/Vouchers Issued	0

APPLICATIONS ON WAITING LIST

Public Housing East	107
Public Housing West	109
Parker Bluff	244
Section 8 Program	342

Family Self-Sufficiency Participants

Section 8 – 21

Public Housing – 13

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	4b		
Topic:	July Activity Report		
Date:	August 23, 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 was no public housing vacancies. Seven annual and seven interim certifications were completed. Eight public housing inspections were conducted.

Housing Choice Voucher (Section 8):

437 vouchers were housed on July 31, 2023, and six port-in vouchers were administered. The Housing Specialists completed 32 annual and 37 interim recertifications during this reporting period. 57 Housing Quality Standards (HQS) inspections were completed.

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

July 2023 Activity Report

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

PUBLIC HOUSING

Total Public Housing Units	131 Units	
Occupied on 7/31/2023	131 Units	100% Occupancy
Vacancies on 7/31/2023	0 Units	0% Vacancy
Vacancies by Type		
Elderly	0 Units	100% Occupancy
Family	0 Units	100% Occupancy

Public Housing Inspections

Eight annual inspections were completed during this reporting period.

Public Housing Activities

Annual Recertifications	7
Interim Recertifications	7
Tenant notices to Vacate *Not due to eviction	0
New Tenants	0
Transfers	0
Lease Terminations	0
Possible Program Violations	2
Evictions	0

Public Housing Briefings

Number Notified	10
Number Briefed	5

Section 8 Program

Total Under Lease on 7/31/2023	437 Vouchers
Total Portable Vouchers Paid	0 Vouchers
Total Port Out*	0 Vouchers
Total Port In*	6 Vouchers
July HCV HAP Funds Received	\$260,503
July HCV HAP Funds Expended	\$271,704
Current Per Unit Cost (PUC)	\$622

* 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 34 annual inspections, 12 reinspections, 10 initial inspections, and one special inspection during this reporting period.

Section 8 Activities

New Participants	5
Annual Recertifications	32
Interim Recertifications	37
Abatements	0
Unit Transfers	4
Possible Program Violations	0
End of Program	3
Port Ins	2
Port Outs	1

Section 8 Briefings

Number Notified	0
Number Briefed/Vouchers Issued	0

APPLICATIONS ON WAITING LIST

Public Housing East	117
Public Housing West	117
Parker Bluff	260
Section 8 Program	368

Family Self-Sufficiency Participants

Section 8 – 21

Public Housing – 13

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	4c		
Topic:	May 2023 Financial Report		
Date:	August 23, 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 May 31, 2023.

At the end of this reporting period, the Low Income Public Housing (LIPH) program income was \$269,219.26 and the LIPH expenses were \$227,708.38. There was a surplus of \$41,510.88 in LIPH.

At the end of this reporting period, inflows of revenue from LIPH Grants total \$94,004.52 and related grant expenses total \$94,004.52.

At the end of this reporting period, the Project Based Voucher (PBV) program income was \$0.00 and the expenses were \$625.50. The PBV had a deficit of \$625.50. 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 \$156,679.52 and the expenses were \$153,773.46. Phase 1 had a surplus of \$2,906.06. Of this surplus, \$0.29 is the Housing Authority's portion.

At the end of this reporting period, Phase 2 program income was \$149,286.97 and the expenses were \$149,508.53. Phase 2 had a deficit of \$221.56. Of this deficit, \$0.02 is the Housing Authority's portion. A deficit at the end of this reporting period is the result of experiencing significant maintenance contracted service costs and greater than anticipated maintenance personnel payroll expense required to ready Phase 2 units for REAC inspection.

At the end of this reporting period, the Housing Choice Voucher (HCV) program income was \$1,456,037.24 and expenses were \$1,404,215.47. The HCV program had a surplus of \$51,821.77.

Debts owed BHA collected through May 2023: Total \$7,362.07
 TRIP Program: \$7,362.07 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 sustainable long term impact of this policy or program related to how it will impact both the built and natural environment. Consider whether the policy of program will reduce dependence upon fossil fuels, reduce dependence on chemicals and other manufacturing substances that accumulate in nature, reduce dependence on activities that harm life sustaining eco-systems, and/or meet the hierarchy of present and future human needs fairly and efficiently. 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

May 2023 Financial Report

Consolidated 2023 Budget Report for LIPH/PBV - As of May 31, 2023

	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	20.83		300.56			300.56	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	1,250.00					-	3,000.00	3,000.00
8 Other Income - Laundry/Copy Fees/Misc	11,666.67		70,153.70			70,153.70	28,000.00	28,000.00
9 Other Income - CFP/Operations Money	125,000.00			67,913.50		67,913.50	300,000.00	300,000.00
10 Other Income - Sale of Asset Gain/Loss	-					-		-
11 Admin Fees Earned - HUD	-					-		-
12 Incoming Billable Admin Fees/Oper Sub	8,986.57					-	21,567.76	21,567.76
13 ROSS/FSS Grant	42,471.19			26,091.02		26,091.02	101,930.86	101,930.86
14 HAP Subsidy	-					-		-
15 Operating Subsidy	185,179.17		198,765.00			198,765.00	444,430.00	444,430.00
Total Income	374,574.43		269,219.26	94,004.52	-	363,223.78	898,978.62	898,978.62

	Expenses	Approved YTD	LIPH	LIPH Grant	PBV	Total	LIPH/PBV	Total
Administrative Expenses								
16 Admin Salaries		32,159.31	30,577.90			30,577.90	77,182.34	77,182.34
17 ROSS/FSS Coordinator Admin Salaries		35,198.00		18,781.60		18,781.60	84,475.20	84,475.20
18 Admin Employee Benefits		16,247.27	13,104.47			13,104.47	38,993.44	38,993.44
19 ROSS/FSS Coordinator Admin Benefits		7,210.69		7,309.42		7,309.42	17,305.66	17,305.66
20 Advertising & Marketing		20.83				-	50.00	50.00
21 Legal		41.67				-	100.00	100.00
22 Staff Training		1,041.67		1,424.00		1,424.00	2,500.00	2,500.00
23 Travel		83.33	80.89			80.89	200.00	200.00
24 Accounting Consultants		3,020.83	1,635.00		362.00	1,997.00	7,250.00	7,250.00
25 Audit Fee		4,766.67	4,920.00			4,920.00	11,440.00	11,440.00
26 Telephone		583.33	667.26			667.26	1,400.00	1,400.00
27 Postage		1,562.50	1,713.20			1,713.20	3,750.00	3,750.00
28 Office Supplies		166.67	112.05			112.05	400.00	400.00
29 Memberships & Publications		853.33	346.22			346.22	2,048.00	2,048.00
30 Bank Fees		-				-		-
31 Computer Maintenance		-				-		-
32 Copier Expenses		1,041.67	1,167.07			1,167.07	2,500.00	2,500.00
33 Office Equipment Maintenance		-				-		-
34 Postage Machine		-				-		-
35 Software Maintenance		1,666.67	1,750.85			1,750.85	4,000.00	4,000.00
36 Outgoing Portable Admin Fees		-				-		-
37 Sundry Administration/Compliance Fees		291.67	1,810.00			1,810.00	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	1,250.00				-	3,000.00		3,000.00
43	Casual Labor - Maintenance	-				-			-
44	Maintenance Benefits	416.67				-	1,000.00		1,000.00
45	Maintenance Materials & Supplies	208.33				-	500.00		500.00
46	Plumbing Supplies	-	17.49			17.49			-
47	Locks, Locksets & Keys	-				-			-
48	Electrical Supplies	-				-			-
49	Painting Supplies	-				-			-
50	Cleaning Supplies	83.33	277.80			277.80	200.00		200.00
51	Equipment Repair Parts	-				-			-
52	Maintenance Contracted Services	625.00	221.50			221.50	1,500.00		1,500.00
53	Refuse Removal Services	41.67		64.48		64.48	100.00		100.00
54	Plumbing Repair Services	-				-			-
55	Heating/AC Repair Services	-				-			-
56	Electric Repair Service	-				-			-
57	Window Repair Service	-				-			-
58	Automotive Repairs/Fuel	41.67				-	100.00		100.00
59	Elevator Repair & Maintenance	625.00	1,551.84			1,551.84	1,500.00		1,500.00
60	Pest Control Services	-				-			-
61	Cable TV	-				-			-
62	Answering Service	1,333.33	1,930.00			1,930.00	3,200.00		3,200.00
63	Misc Contracts	-				-			-
64	Clean/Paint Units	-				-			-
	Utilities Expenses	-							
65	Water/Sewer	666.67	739.13		33.00	772.13	1,600.00		1,600.00
66	Electricity	2,291.67	2,547.99		61.72	2,609.71	5,500.00		5,500.00
67	Natural Gas	1,041.67	1,616.66			1,616.66	2,500.00		2,500.00
	Other Operating Expenses	-							
68	Protective Services Contract	833.33	840.35			840.35	2,000.00		2,000.00
69	Insurance	7,146.18	8,357.48		104.30	8,461.78	17,150.82		17,150.82
70	PILOT	-				-			-
71	Compensated Absences	-				-			-
72	Collection Losses	-				-			-
73	Replacement Reserves & Debt Pmt-Princ	-				-			-
74	Other General Expense/Asset Mgmt Fees	113,927.75	151,723.23			151,723.23	273,426.60		273,426.60
75	Casualty Losses - Non Capitalized	-				-			-
76	Capital/Operations Expenditures	80,625.00	66,489.50			66,489.50	193,500.00		193,500.00
77	Transfer In / Out	-				-			-
	Total Expense	317,113.36	227,708.38	94,004.52	625.50	322,338.40	761,072.06	-	761,072.06

Net Income/(Loss):

41,510.88	-	(625.50)	40,885.38
-----------	---	----------	-----------

**Cash Flow Statement
Beloit Housing Authority
LIPH/PBV
As of 5/31/2023**

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income					
Dwelling Rent/Utilities	-		-		-
Interest on Investments	300.56		50.00	0.00%	250.56
Other Income	70,153.70	67,913.50	331,000.00	41.71%	(192,932.80)
HUD Admin Fees			-		-
HUD Grants/Subsidies	198,765.00	26,091.02	567,928.62	39.59%	(343,072.60)
Total Income	269,219.26	94,004.52	898,978.62		(535,754.84)

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses					
Administrative					
Salaries/Benefits	43,682.37	26,091.02	217,956.64	32.01%	148,183.25
Office Expenses	11,646.62	1,424.00	33,838.00	38.63%	20,767.38
Office Contracted Services	2,917.92		6,500.00	44.89%	3,582.08
Oper Sub Transfer/Mgmt Fee Pd			-		-
Housing Assistance Pmts			-		-
HAP Payments Port In					
Maintenance					
Salaries/Benefits	-		-		-
Materials & Supplies	295.29	-	700.00	42.18%	404.71
Maintenance Contracts	3,767.82		6,400.00	58.87%	2,632.18
Utilities	4,998.50		9,600.00	52.07%	4,601.50
Other Operating					
Protective Services	840.35		2,000.00	42.02%	1,159.65
Insurance	8,461.78		17,150.82	49.34%	8,689.04
PILOT	-		-	0.00%	-
Other Operating Expenses	151,723.23	66,489.50	466,926.60	46.73%	248,713.87
Total Expenses	228,333.88	94,004.52	761,072.06		438,733.66

Net Admin Income (Loss)	40,885.38	-			
Net HAP Income (Loss)					
Total YTD Income (Loss)	40,885.38	-			

Consolidated 2023 Budget Report for Phase 1 - As of May 31, 2023

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
1 Dwelling Rental	49,166.67	59,843.21	59,843.21	118,000.00		118,000.00
2 Excess Utilities	-		-			-
3 Interest on Unrestricted Fund Investments	83.33	1,472.26	1,472.26	200.00		200.00
4 Income - Transfer In from Other Funds	11,584.05		-	27,801.71		27,801.71
5 Other Income - Tenants	9,646.62	4,930.44	4,930.44	23,151.88		23,151.88
6 HAP Fraud Recovery & FSS Forfeitures	-		-			-
7 Other Income - Bad Debt Collections	2,083.33	3,011.00	3,011.00	5,000.00		5,000.00
8 Other Income - Laundry/Copy Fees/Misc	-	41.85	41.85			-
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	55,802.75	87,380.76	87,380.76	133,926.60		133,926.60
13 ROSS/CFP Grant	-		-			-
14 HAP Subsidy	-		-			-
15 Operating Subsidy	-		-			-
Total Income	128,366.75	156,679.52	156,679.52	308,080.19		308,080.19

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
Administrative Expenses						
16 Admin Payroll Expenses	33,135.11	31,863.53	31,863.53	79,524.27		79,524.27
17 FSS Coordinator Admin Salaries	-		-			-
18 FSS Coordinator Admin Benefits	-		-			-
19 Advertising & Marketing	20.83		-	50.00		50.00
20 Legal	916.67		-	2,200.00		2,200.00
21 Staff Training	-		-			-
22 Travel	-		-			-
23 Accounting Consultants	2,625.00	1,234.00	1,234.00	6,300.00		6,300.00
24 Audit Fee	5,000.00	13,630.00	13,630.00	12,000.00		12,000.00
25 Telephone	-		-			-
26 Postage	-		-			-
27 Office Supplies	108.33	157.14	157.14	260.00		260.00
28 Memberships & Publications	-		-			-
29 Bank Fees	34.50	31.30	31.30	82.80		82.80
30 Computer Maintenance	-		-			-
31 Copier Expenses	-		-			-
32 Office Equipment Maintenance	-		-			-
33 Postage Machine	-		-			-
34 Software Maintenance	1,382.45	1,702.55	1,702.55	3,317.88		3,317.88
35 Outgoing Portable Admin Fees	-		-			-
36 Sundry Administration/Compliance Fees/TP	2,333.33	4,911.19	4,911.19	5,600.00		5,600.00
37 Port-In HAP Expense	-		-			-
38 Management Fees	2,808.33	2,771.74	2,771.74	6,739.98		6,739.98

39	Eviction & Collection Agent Fees	-		-			-
40	HAP Expense (net fraud recovery to HUD)	-		-			-
	HAP Overfunding (Underfunding)	-					-
	Maintenance Expenses	-					
42	Maintenance Payroll Expenses	39,033.83	30,098.85	30,098.85	93,681.19		93,681.19
43	Casual Labor - Maintenance	-		-			-
44	Maintenance Materials & Supplies	3,333.33	14,584.28	14,584.28	8,000.00		8,000.00
45	Plumbing Supplies	-		-			-
46	Locks, Locksets & Keys	-		-			-
47	Electrical Supplies	-		-			-
48	Painting Supplies	-		-			-
49	Cleaning Supplies	-		-			-
50	Equipment Repair Parts	-		-			-
51	Maintenance Contracted Services	5,000.00	29,205.19	29,205.19	12,000.00		12,000.00
52	Refuse Removal Services	520.83		-	1,250.00		1,250.00
53	Plumbing Repair Services	-		-			-
54	Heating/AC Repair Services	416.67	741.00	741.00	1,000.00		1,000.00
55	Electric Repair Service	-		-			-
56	Window Repair Service	-		-			-
57	Automotive Repairs/Fuel	1,452.30	886.25	886.25	3,485.52		3,485.52
58	Elevator Repair & Maintenance	-		-			-
59	Pest Control Services	416.67		-	1,000.00		1,000.00
60	Cable TV	-		-			-
61	Answering Service	-		-			-
62	Misc Contracts	-		-			-
63	Clean/Paint Units	-		-			-
	Utilities Expenses	-					
64	Water/Sewer	2,291.67	1,230.68	1,230.68	5,500.00		5,500.00
65	Electricity	583.33	606.66	606.66	1,400.00		1,400.00
66	Natural Gas	416.67	961.99	961.99	1,000.00		1,000.00
	Other Operating Expenses	-					
67	Protective Services Contract	4,166.67	1,250.00	1,250.00	10,000.00		10,000.00
68	Insurance	6,204.78	7,501.30	7,501.30	14,891.47		14,891.47
69	PILOT	4,791.67	5,801.66	5,801.66	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	1,364.58	4,604.15	4,604.15	3,275.00		3,275.00
74	Casualty Losses - Non Capitalized	-		-			-
75	Capital Expenditures	-		-			-
76	Transfer In / Out	-		-			-
	Total Expense	118,357.55	153,773.46	153,773.46	284,058.11	-	284,058.11

Net Income/(Loss):

2,906.06 2,906.06

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

0.29

Cash Flow Statement
Beloit Housing Authority
Phase 1
As of 5/31/2023

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income				
Dwelling Rent/Utilities	59,843.21	118,000.00	50.71%	(58,156.79)
Interest on Investments	1,472.26	200.00	736.13%	1,272.26
Other Income	95,364.05	162,078.48	58.84%	(66,714.43)
HUD Admin Fees		-		-
HUD Grants/Subsidies		27,801.71		(27,801.71)
Total Income	156,679.52	308,080.19		(151,400.67)
		16,486.89		

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses				
Administrative				
Salaries/Benefits	31,863.53	79,524.27	40.07%	47,660.74
Office Expenses	21,666.18	26,492.80	81.78%	4,826.62
Office Contracted Services		3,317.88		3,317.88
Oper Sub Transfer/Mgmt Fee F	2,771.74	6,739.98	41.12%	3,968.24
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	30,098.85	93,681.19	32.13%	63,582.34
Materials & Supplies	14,584.28	8,000.00	182.30%	(6,584.28)
Maintenance Contracts	30,832.44	18,735.52	164.57%	(12,096.92)
Utilities	2,799.33	7,900.00	35.43%	5,100.67
Other Operating				
Protective Services	1,250.00	10,000.00	12.50%	8,750.00
Insurance	7,501.30	14,891.47	50.37%	7,390.17
PILOT	5,801.66	11,500.00	50.45%	5,698.34
Other Operating Expenses	4,604.15	3,275.00	140.58%	(1,329.15)
Total Expenses	153,773.46	284,058.11		130,284.65

Net Admin Income (Loss)	2,906.06
Net HAP Income (Loss)	
Total YTD Income (Loss)	2,906.06
Housing Authority's Portion	<u>0.29</u>

Consolidated 2023 Budget Report for Phase 2 - As of May 31, 2023

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
1 Dwelling Rental	58,750.00	79,209.00	79,209.00	141,000.00	141,000.00	
2 Excess Utilities	-	-	-	-	-	
3 Interest on Unrestricted Fund Investments	312.50	2,872.76	2,872.76	750.00	750.00	
4 Income - Transfer In from Other Funds	11,419.93	-	-	27,407.83	27,407.83	
5 Other Income - Tenants	500.00	2,812.30	2,812.30	1,200.00	1,200.00	
6 HAP Fraud Recovery & FSS Forfeitures	-	-	-	-	-	
7 Other Income - Bad Debt Collections	2,083.33	50.44	50.44	5,000.00	5,000.00	
8 Other Income - Laundry/Copy Fees/Misc	-	-	-	-	-	
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	58,125.00	64,342.47	64,342.47	139,500.00	139,500.00	
13 ROSS/CFP Grant	-	-	-	-	-	
14 HAP Subsidy	-	-	-	-	-	
15 Operating Subsidy	-	-	-	-	-	
Total Income	131,190.76	149,286.97	149,286.97	314,857.83	314,857.83	

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
Administrative Expenses						
16 Admin Payroll Expenses	27,313.55	28,033.95	28,033.95	65,552.53	65,552.53	
17 FSS Coordinator Admin Salaries	-	-	-	-	-	
18 FSS Coordinator Admin Benefits	-	-	-	-	-	
19 Advertising & Marketing	20.83	-	-	50.00	50.00	
20 Legal	625.00	820.00	820.00	1,500.00	1,500.00	
21 Staff Training	-	-	-	-	-	
22 Travel	-	-	-	-	-	
23 Accounting Consultants	2,625.00	1,034.00	1,034.00	6,300.00	6,300.00	
24 Audit Fee	4,583.33	13,630.00	13,630.00	11,000.00	11,000.00	
25 Telephone	-	-	-	-	-	
26 Postage	-	-	-	-	-	
27 Office Supplies	108.33	157.12	157.12	260.00	260.00	
28 Memberships & Publications	-	-	-	-	-	
29 Bank Fees	20.83	-	-	50.00	50.00	
30 Computer Maintenance	-	-	-	-	-	
31 Copier Expenses	-	-	-	-	-	
32 Office Equipment Maintenance	-	-	-	-	-	
33 Postage Machine	-	-	-	-	-	
34 Software Maintenance	1,382.45	1,702.56	1,702.56	3,317.87	3,317.87	
35 Outgoing Portable Admin Fees	-	-	-	-	-	
36 Sundry Administration/Compliance Fees/TP	2,343.75	4,133.04	4,133.04	5,625.00	5,625.00	
37 Port-In HAP Expense	-	-	-	-	-	
38 Management Fees	6,178.24	6,583.31	6,583.31	14,827.78	14,827.78	

39	Eviction & Collection Agent Fees	-		-			-
40	HAP Expense (net fraud recovery to HUD)	-		-			-
	HAP Overfunding (Underfunding)	-					-
	Maintenance Expenses	-					
42	Maintenance Payroll Expenses	29,512.43	33,845.03	33,845.03	70,829.84		70,829.84
43	Casual Labor - Maintenance	-		-			-
44	Maintenance Materials & Supplies	3,333.33	2,871.83	2,871.83	8,000.00		8,000.00
45	Plumbing Supplies	-		-			-
46	Locks, Locksets & Keys	-		-			-
47	Electrical Supplies	-		-			-
48	Painting Supplies	-		-			-
49	Cleaning Supplies	-		-			-
50	Equipment Repair Parts	-		-			-
51	Maintenance Contracted Services	5,000.00	11,511.66	11,511.66	12,000.00		12,000.00
52	Refuse Removal Services	1,250.00	2,827.00	2,827.00	3,000.00		3,000.00
53	Plumbing Repair Services	-		-			-
54	Heating/AC Repair Services	500.00		-	1,200.00		1,200.00
55	Electric Repair Service	-		-			-
56	Window Repair Service	-		-			-
57	Automotive Repairs/Fuel	1,050.70	856.03	856.03	2,521.68		2,521.68
58	Elevator Repair & Maintenance	1,145.83	2,488.97	2,488.97	2,750.00		2,750.00
59	Pest Control Services	208.33		-	500.00		500.00
60	Cable TV	729.17	3,392.11	3,392.11	1,750.00		1,750.00
61	Answering Service	-		-			-
62	Misc Contracts	-		-			-
63	Clean/Paint Units	-		-			-
	Utilities Expenses	-					
64	Water/Sewer	3,541.67	3,465.45	3,465.45	8,500.00		8,500.00
65	Electricity	7,500.00	7,053.29	7,053.29	18,000.00		18,000.00
66	Natural Gas	3,750.00	4,893.06	4,893.06	9,000.00		9,000.00
	Other Operating Expenses	-					
67	Protective Services Contract	4,583.33	1,959.54	1,959.54	11,000.00		11,000.00
68	Insurance	6,821.09	8,011.98	8,011.98	16,370.61		16,370.61
69	PILOT	4,791.67	6,431.95	6,431.95	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	3,625.00	3,806.65	3,806.65	8,700.00		8,700.00
74	Casualty Losses - Non Capitalized	-		-			-
75	Capital Expenditures	-		-			-
76	Transfer In / Out	-		-			-
	Total Expense	122,543.88	149,508.53	149,508.53	294,105.31	-	294,105.31

Net Income/(Loss):	<u>(221.56)</u>	<u>(221.56)</u>
Housing Authority's Portion of Net Income/(Loss):	<u>(0.02)</u>	

**Cash Flow Statement
Beloit Housing Authority
Phase 2
As of 5/31/2023**

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income				
Dwelling Rent/Utilities	79,209.00	141,000.00	56.18%	(61,791.00)
Interest on Investments	2,872.76	750.00	383.03%	2,122.76
Other Income	67,205.21	145,700.00	46.13%	(78,494.79)
HUD Admin Fees		-		-
HUD Grants/Subsidies		27,407.83		(27,407.83)
Total Income	149,286.97	314,857.83		(165,570.86)

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses				
Administrative				
Salaries/Benefits	28,033.95	65,552.53	42.77%	37,518.58
Office Expenses	21,476.72	24,785.00	86.65%	3,308.28
Office Contracted Services		3,317.87		3,317.87
Oper Sub Transfer/Mgmt Fee P	6,583.31	14,827.78	44.40%	8,244.47
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	33,845.03	70,829.84	47.78%	36,984.81
Materials & Supplies	2,871.83	8,000.00	35.90%	5,128.17
Maintenance Contracts	21,075.77	23,721.68	88.85%	2,645.91
Utilities	15,411.80	35,500.00	43.41%	20,088.20
Other Operating				
Protective Services	1,959.54	11,000.00	17.81%	9,040.46
Insurance	8,011.98	16,370.61	48.94%	8,358.63
PILOT	6,431.95	11,500.00	55.93%	5,068.05
Other Operating Expenses	3,806.65	8,700.00	43.75%	4,893.35
Total Expenses	149,508.53	294,105.31		144,596.78

Net Admin Income (Loss)	(221.56)
Net HAP Income (Loss)	
Total YTD Income (Loss)	(221.56)
Housing Authority's Portion	(0.02)

Consolidated 2023 Budget Report for Housing Choice Voucher - As of May 31, 2023

	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	1,400.00		1,626.70	1,626.70		3,360.00	3,360.00
4 Income - Transfer In from Other Funds	-			-			-
5 Other Income - Tenants/Landlords	-		367.00	367.00			-
6 HAP Fraud Recovery & FSS Forfeitures	312.50		1,224.00	1,224.00		750.00	750.00
7 Other Income - Bad Debt Collections	-			-			-
8 Other Income - Laundry/Copy Fees/Misc	12,866.92		13,421.00	13,421.00		30,880.60	30,880.60
9 Other Income - CFP Operation Money	-			-			-
10 Other Income - Sale of Asset Gain/Loss	-			-			-
11 Admin Fees Earned - HUD	135,010.00		137,081.00	137,081.00		324,024.00	324,024.00
12 Incoming Billable Admin Fees/Oper Sub	833.33		1,365.54	1,365.54		2,000.00	2,000.00
13 ROSS/CFP Grant	-			-			-
14 HAP Subsidy	1,214,583.33		1,300,952.00	1,300,952.00		2,915,000.00	2,915,000.00
15 Operating Subsidy	-			-			-
Total Income	1,365,006.08		1,456,037.24	1,456,037.24	-	3,276,014.60	3,276,014.60
Expenses							
	Approved YTD		HCV	HCV Total		HCV	Total
Administrative Expenses							
16 Admin Salaries	83,548.54		76,738.69	76,738.69		200,516.49	200,516.49
17 FSS Coordinator Admin Salaries	-			-			-
18 Admin Employee Benefits	29,218.48		24,418.40	24,418.40		70,124.36	70,124.36
19 FSS Coordinator Admin Benefits	-			-			-
20 Advertising & Marketing	20.83			-		50.00	50.00
21 Legal	208.33			-		500.00	500.00
22 Staff Training	729.17			-		1,750.00	1,750.00
23 Travel	104.17		80.91	80.91		250.00	250.00
24 Accounting Consultants	2,401.67		795.00	795.00		5,764.00	5,764.00
25 Audit Fee	4,583.33		4,920.00	4,920.00		11,000.00	11,000.00
26 Telephone	462.79		559.86	559.86		1,110.70	1,110.70
27 Postage	-			-			-
28 Office Supplies	833.33		738.62	738.62		2,000.00	2,000.00
29 Memberships & Publications	291.67		276.22	276.22		700.00	700.00
30 Bank Fees	1,755.08		1,788.46	1,788.46		4,212.20	4,212.20
31 Computer Maintenance	-			-			-
32 Copier Expenses	794.08		1,167.09	1,167.09		1,905.80	1,905.80
33 Office Equipment Maintenance	-			-			-
34 Postage Machine	1,458.33		1,508.42	1,508.42		3,500.00	3,500.00
35 Software Maintenance	2,395.83		1,874.82	1,874.82		5,750.00	5,750.00
36 Outgoing Portable Admin Fees	-			-			-
37 Sundry Administration/Compliance Fees	1,458.33		4,590.02	4,590.02		3,500.00	3,500.00
38 Port-In HAP Expense	-		13,421.00	13,421.00			-
39 Management Fees	-			-			-

40	Eviction & Collection Agent Fees	-		-		-	
41	HAP Expense (net fraud recovery to HUD)	1,197,220.00		1,270,232.00	1,270,232.00	2,873,328.00	2,873,328.00
	HAP Overfunding (Underfunding)	17,675.83		31,944.00		42,422.00	42,422.00
	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	208.33		-		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	148.75		-		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	1,040.88		1,105.96	1,105.96	2,498.10	2,498.10
70	PILOT	-		-		-	-
71	Compensated Absences	-		-		-	-
72	Collection Losses	-		-		-	-
73	Replacement Reserves & Debt Pmt-Princ	-		-		-	-
74	Other General Expense/Asset Mgmt Fees	1,833.33		-		4,400.00	4,400.00
75	Casualty Losses - Non Capitalized	-		-		-	-
76	Capital Expenditures	-		-		-	-
77	Transfer In / Out	-		-		-	-
	Total Expense	1,348,391.10		1,404,215.47	1,404,215.47	-	3,193,716.65

Net Income/(Loss):

51,821.77

**Cash Flow Statement
Beloit Housing Authority
Housing Choice Voucher
As of 5/31/2023**

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<i>Income</i>				
Dwelling Rent/Utilities		-		-
Interest on Investments	1,626.70	3,360.00	48.41%	(1,733.30)
Other Income	13,788.00	33,630.60	41.00%	(19,842.60)
HUD Admin Fees	137,081.00	324,024.00	42.31%	(186,943.00)
HUD Grants/Subsidies	1,303,541.54	2,915,000.00	44.72%	(1,611,458.46)
Total Income	1,456,037.24	3,276,014.60		(1,819,977.36)

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<i>Expenses</i>				
Administrative				
Salaries/Benefits	101,157.09	270,640.85	37.38%	169,483.76
Office Expenses	13,749.09	30,836.90	44.59%	17,087.81
Office Contracted Services	4,550.33	11,155.80	40.79%	6,605.47
Oper Sub Transfer/Mgmt Fee Pd		-		-
Housing Assistance Pmts	1,270,232.00	2,873,328.00	44.21%	1,603,096.00
HAP Payments Port In	13,421.00		0.00%	(13,421.00)
Maintenance				
Salaries/Benefits		-		-
Materials & Supplies		-		-
Maintenance Contracts		857.00	0.00%	857.00
Utilities		-		-
Other Operating				
Protective Services		-		-
Insurance	1,105.96	2,498.10	44.27%	1,392.14
PILOT		-		-
Other Operating Expenses	-	4,400.00	0.00%	4,400.00
Total Expenses	1,404,215.47	3,193,716.65		1,789,501.18

Net Income/(Loss): 51,821.77

REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



Agenda Number:	4d		
Topic:	June 2023 Financial Report		
Date:	August 23, 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 June 30, 2023.

At the end of this reporting period, the Low Income Public Housing (LIPH) program income was \$311,391.01 and the LIPH expenses were \$257,468.05. There was a surplus of \$53,922.96 in LIPH.

At the end of this reporting period, inflows of revenue from LIPH Grants total \$105,450.89 and related grant expenses total \$105,450.89.

At the end of this reporting period, the Project Based Voucher (PBV) program income was \$0.00 and the expenses were \$970.34. The PBV had a deficit of \$970.34. 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 \$183,973.33 and the expenses were \$175,852.28. Phase 1 had a surplus of \$2,906.06. Of this surplus, \$0.81 is the Housing Authority's portion.

At the end of this reporting period, Phase 2 program income was \$177,947.68 and the expenses were \$175,732.24. Phase 2 had a surplus of \$2,215.44. Of this surplus, \$0.22 is the Housing Authority's portion.

At the end of this reporting period, the Housing Choice Voucher (HCV) program income was \$1,734,581.68 and expenses were \$1,703,034.17. The HCV program had a surplus of \$31,547.51.

Debts owed BHA collected through June 2023: Total \$8,178.07
 TRIP Program: \$8,178.07 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 sustainable long term impact of this policy or program related to how it will impact both the built and natural environment. Consider whether the policy of program will reduce dependence upon fossil fuels, reduce dependence on chemicals and other manufacturing substances that accumulate in nature, reduce dependence on activities that harm life sustaining eco-systems, and/or meet the hierarchy of present and future human needs fairly and efficiently. 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

June 2023 Financial Report

Consolidated 2023 Budget Report for LIPH/PBV - As of June 30, 2023

	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	25.00	360.42			360.42	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	1,500.00				-	3,000.00	3,000.00
8	Other Income - Laundry/Copy Fees/Misc	14,000.00	72,200.59			72,200.59	28,000.00	28,000.00
9	Other Income - CFP/Operations Money	150,000.00	370.00	74,194.74		74,564.74	300,000.00	300,000.00
10	Other Income - Sale of Asset Gain/Loss	-				-		-
11	Admin Fees Earned - HUD	-				-		-
12	Incoming Billable Admin Fees/Oper Sub	10,783.88				-	21,567.76	21,567.76
13	ROSS/FSS Grant	50,965.43		31,256.15		31,256.15	101,930.86	101,930.86
14	HAP Subsidy	-				-		-
15	Operating Subsidy	222,215.00	238,460.00			238,460.00	444,430.00	444,430.00
	Total Income	449,489.31	311,391.01	105,450.89	-	416,841.90	898,978.62	898,978.62

	YTD Actual					Annual Board Approved Budget		
	Expenses	Approved YTD	LIPH	LIPH Grant	PBV	Total	LIPH/PBV	Total
Administrative Expenses								
16	Admin Salaries	38,591.17	36,140.86			36,140.86	77,182.34	77,182.34
17	ROSS/FSS Coordinator Admin Salaries	42,237.60		22,572.00		22,572.00	84,475.20	84,475.20
18	Admin Employee Benefits	19,496.72	15,465.79			15,465.79	38,993.44	38,993.44
19	ROSS/FSS Coordinator Admin Benefits	8,652.83		8,684.15		8,684.15	17,305.66	17,305.66
20	Advertising & Marketing	25.00				-	50.00	50.00
21	Legal	50.00				-	100.00	100.00
22	Staff Training	1,250.00		1,424.00		1,424.00	2,500.00	2,500.00
23	Travel	100.00	100.87			100.87	200.00	200.00
24	Accounting Consultants	3,625.00	2,507.00		666.00	3,173.00	7,250.00	7,250.00
25	Audit Fee	5,720.00	5,795.00			5,795.00	11,440.00	11,440.00
26	Telephone	700.00	857.40			857.40	1,400.00	1,400.00
27	Postage	1,875.00	2,048.63			2,048.63	3,750.00	3,750.00
28	Office Supplies	200.00	137.29			137.29	400.00	400.00
29	Memberships & Publications	1,024.00	394.22			394.22	2,048.00	2,048.00
30	Bank Fees	-				-		-
31	Computer Maintenance	-				-		-
32	Copier Expenses	1,250.00	1,384.28			1,384.28	2,500.00	2,500.00
33	Office Equipment Maintenance	-				-		-
34	Postage Machine	-				-		-
35	Software Maintenance	2,000.00	2,055.54			2,055.54	4,000.00	4,000.00
36	Outgoing Portable Admin Fees	-				-		-
37	Sundry Administration/Compliance Fees	350.00	2,455.50			2,455.50	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	1,500.00				-	3,000.00		3,000.00
43	Casual Labor - Maintenance	-				-			-
44	Maintenance Benefits	500.00				-	1,000.00		1,000.00
45	Maintenance Materials & Supplies	250.00				-	500.00		500.00
46	Plumbing Supplies	-	17.49			17.49			-
47	Locks, Locksets & Keys	-				-			-
48	Electrical Supplies	-				-			-
49	Painting Supplies	-				-			-
50	Cleaning Supplies	100.00	277.80			277.80	200.00		200.00
51	Equipment Repair Parts	-				-			-
52	Maintenance Contracted Services	750.00	221.50			221.50	1,500.00		1,500.00
53	Refuse Removal Services	50.00		80.48		80.48	100.00		100.00
54	Plumbing Repair Services	-				-			-
55	Heating/AC Repair Services	-				-			-
56	Electric Repair Service	-				-			-
57	Window Repair Service	-				-			-
58	Automotive Repairs/Fuel	50.00				-	100.00		100.00
59	Elevator Repair & Maintenance	750.00	1,551.84			1,551.84	1,500.00		1,500.00
60	Pest Control Services	-				-			-
61	Cable TV	-				-			-
62	Answering Service	1,600.00	2,609.18			2,609.18	3,200.00		3,200.00
63	Misc Contracts	-				-			-
64	Clean/Paint Units	-				-			-
	Utilities Expenses	-							
65	Water/Sewer	800.00	884.83	41.25		926.08	1,600.00		1,600.00
66	Electricity	2,750.00	3,101.54	78.31		3,179.85	5,500.00		5,500.00
67	Natural Gas	1,250.00	1,650.54			1,650.54	2,500.00		2,500.00
	Other Operating Expenses	-							
68	Protective Services Contract	1,000.00	1,018.22			1,018.22	2,000.00		2,000.00
69	Insurance	8,575.41	8,357.48	104.30		8,461.78	17,150.82		17,150.82
70	PILOT	-				-			-
71	Compensated Absences	-				-			-
72	Collection Losses	-				-			-
73	Replacement Reserves & Debt Pmt-Princ	-				-			-
74	Other General Expense/Asset Mgmt Fees	136,713.30	168,435.25			168,435.25	273,426.60		273,426.60
75	Casualty Losses - Non Capitalized	-				-			-
76	Capital/Operations Expenditures	96,750.00		72,770.74		72,770.74	193,500.00		193,500.00
77	Transfer In / Out	-				-			-
	Total Expense	380,536.03	257,468.05	105,450.89	970.34	363,889.28	761,072.06	-	761,072.06

Net Income/(Loss):

53,922.96 - (970.34) 52,952.62

**Cash Flow Statement
Beloit Housing Authority
LIPH/PBV
As of 6/30/2023**

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income					
Dwelling Rent/Utilities	-		-		-
Interest on Investments	360.42		50.00	0.00%	310.42
Other Income	72,200.59	74,194.74	331,000.00	44.23%	(184,604.67)
HUD Admin Fees			-		-
HUD Grants/Subsidies	238,830.00	31,256.15	567,928.62	47.56%	(297,842.47)
Total Income	311,391.01	105,450.89	898,978.62		(482,136.72)

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses					
Administrative					
Salaries/Benefits	51,606.65	31,256.15	217,956.64	38.02%	135,093.84
Office Expenses	14,961.91	1,424.00	33,838.00	48.42%	17,452.09
Office Contracted Services	3,439.82		6,500.00	52.92%	3,060.18
Oper Sub Transfer/Mgmt Fee Pd			-		-
Housing Assistance Pmts			-		-
HAP Payments Port In					
Maintenance					
Salaries/Benefits	-		-		-
Materials & Supplies	295.29	-	700.00	42.18%	404.71
Maintenance Contracts	4,463.00		6,400.00	69.73%	1,937.00
Utilities	5,756.47		9,600.00	59.96%	3,843.53
Other Operating					
Protective Services	1,018.22		2,000.00	50.91%	981.78
Insurance	8,461.78		17,150.82	49.34%	8,689.04
PILOT	-		-	0.00%	-
Other Operating Expenses	168,435.25	72,770.74	466,926.60	51.66%	225,720.61
Total Expenses	258,438.39	105,450.89	761,072.06		397,182.78

Net Admin Income (Loss)	52,952.62	-			
Net HAP Income (Loss)					
Total YTD Income (Loss)	52,952.62	-			

Consolidated 2023 Budget Report for Phase 1 - As of June 30, 2023

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
1 Dwelling Rental	59,000.00	74,605.21	74,605.21	118,000.00		118,000.00
2 Excess Utilities	-		-			-
3 Interest on Unrestricted Fund Investments	100.00	1,765.48	1,765.48	200.00		200.00
4 Income - Transfer In from Other Funds	13,900.86		-	27,801.71		27,801.71
5 Other Income - Tenants	11,575.94	8,577.72	8,577.72	23,151.88		23,151.88
6 HAP Fraud Recovery & FSS Forfeitures	-		-			-
7 Other Income - Bad Debt Collections	2,500.00	3,524.00	3,524.00	5,000.00		5,000.00
8 Other Income - Laundry/Copy Fees/Misc	-	41.85	41.85			-
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	66,963.30	95,459.07	95,459.07	133,926.60		133,926.60
13 ROSS/CFP Grant	-		-			-
14 HAP Subsidy	-		-			-
15 Operating Subsidy	-		-			-
Total Income	154,040.10	183,973.33	183,973.33	308,080.19		308,080.19

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
Administrative Expenses						
16 Admin Payroll Expenses	39,762.14	38,864.06	38,864.06	79,524.27		79,524.27
17 FSS Coordinator Admin Salaries	-		-			-
18 FSS Coordinator Admin Benefits	-		-			-
19 Advertising & Marketing	25.00	47.30	47.30	50.00		50.00
20 Legal	1,100.00		-	2,200.00		2,200.00
21 Staff Training	-		-			-
22 Travel	-		-			-
23 Accounting Consultants	3,150.00	3,110.00	3,110.00	6,300.00		6,300.00
24 Audit Fee	6,000.00	13,630.00	13,630.00	12,000.00		12,000.00
25 Telephone	-		-			-
26 Postage	-		-			-
27 Office Supplies	130.00	182.46	182.46	260.00		260.00
28 Memberships & Publications	-		-			-
29 Bank Fees	41.40	35.10	35.10	82.80		82.80
30 Computer Maintenance	-		-			-
31 Copier Expenses	-		-			-
32 Office Equipment Maintenance	-		-			-
33 Postage Machine	-		-			-
34 Software Maintenance	1,658.94	2,005.34	2,005.34	3,317.88		3,317.88
35 Outgoing Portable Admin Fees	-		-			-
36 Sundry Administration/Compliance Fees/TP	2,800.00	5,321.71	5,321.71	5,600.00		5,600.00
37 Port-In HAP Expense	-		-			-
38 Management Fees	3,369.99	3,491.55	3,491.55	6,739.98		6,739.98

39	Eviction & Collection Agent Fees	-		-			-
40	HAP Expense (net fraud recovery to HUD)	-		-			-
	HAP Overfunding (Underfunding)	-					-
	Maintenance Expenses	-					
42	Maintenance Payroll Expenses	46,840.60	36,695.17	36,695.17	93,681.19		93,681.19
43	Casual Labor - Maintenance	-		-			-
44	Maintenance Materials & Supplies	4,000.00	15,390.46	15,390.46	8,000.00		8,000.00
45	Plumbing Supplies	-		-			-
46	Locks, Locksets & Keys	-		-			-
47	Electrical Supplies	-		-			-
48	Painting Supplies	-		-			-
49	Cleaning Supplies	-		-			-
50	Equipment Repair Parts	-		-			-
51	Maintenance Contracted Services	6,000.00	29,700.19	29,700.19	12,000.00		12,000.00
52	Refuse Removal Services	625.00		-	1,250.00		1,250.00
53	Plumbing Repair Services	-		-			-
54	Heating/AC Repair Services	500.00	1,135.00	1,135.00	1,000.00		1,000.00
55	Electric Repair Service	-		-			-
56	Window Repair Service	-		-			-
57	Automotive Repairs/Fuel	1,742.76	1,287.85	1,287.85	3,485.52		3,485.52
58	Elevator Repair & Maintenance	-		-			-
59	Pest Control Services	500.00		-	1,000.00		1,000.00
60	Cable TV	-		-			-
61	Answering Service	-		-			-
62	Misc Contracts	-		-			-
63	Clean/Paint Units	-		-			-
	Utilities Expenses	-					
64	Water/Sewer	2,750.00	1,193.18	1,193.18	5,500.00		5,500.00
65	Electricity	700.00	648.87	648.87	1,400.00		1,400.00
66	Natural Gas	500.00	961.99	961.99	1,000.00		1,000.00
	Other Operating Expenses	-					
67	Protective Services Contract	5,000.00	2,500.00	2,500.00	10,000.00		10,000.00
68	Insurance	7,445.74	7,501.30	7,501.30	14,891.47		14,891.47
69	PILOT	5,750.00	7,275.77	7,275.77	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	1,637.50	4,874.98	4,874.98	3,275.00		3,275.00
74	Casualty Losses - Non Capitalized	-		-			-
75	Capital Expenditures	-		-			-
76	Transfer In / Out	-		-			-
	Total Expense	142,029.06	175,852.28	175,852.28	284,058.11	-	284,058.11

Net Income/(Loss):

8,121.05

8,121.05

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

0.81

Cash Flow Statement
Beloit Housing Authority
Phase 1
As of 6/30/2023

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
Income				
Dwelling Rent/Utilities	74,605.21	118,000.00	63.22%	(43,394.79)
Interest on Investments	1,765.48	200.00	882.74%	1,565.48
Other Income	107,602.64	162,078.48	66.39%	(54,475.84)
HUD Admin Fees		-		-
HUD Grants/Subsidies		27,801.71		(27,801.71)
Total Income	183,973.33	308,080.19		(124,106.86)
		16,486.89		

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
Expenses				
Administrative				
Salaries/Benefits	38,864.06	79,524.27	48.87%	40,660.21
Office Expenses	24,331.91	26,492.80	91.84%	2,160.89
Office Contracted Services		3,317.88		3,317.88
Oper Sub Transfer/Mgmt Fee F	3,491.55	6,739.98	51.80%	3,248.43
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	36,695.17	93,681.19	39.17%	56,986.02
Materials & Supplies	15,390.46	8,000.00	192.38%	(7,390.46)
Maintenance Contracts	32,123.04	18,735.52	171.46%	(13,387.52)
Utilities	2,804.04	7,900.00	35.49%	5,095.96
Other Operating				
Protective Services	2,500.00	10,000.00	25.00%	7,500.00
Insurance	7,501.30	14,891.47	50.37%	7,390.17
PILOT	7,275.77	11,500.00	63.27%	4,224.23
Other Operating Expenses	4,874.98	3,275.00	148.85%	(1,599.98)
Total Expenses	175,852.28	284,058.11		108,205.83

Net Admin Income (Loss)	8,121.05
Net HAP Income (Loss)	
Total YTD Income (Loss)	8,121.05
Housing Authority's Portion	<u>0.81</u>

Consolidated 2023 Budget Report for Phase 2 - As of June 30, 2023

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
1 Dwelling Rental	70,500.00	96,831.00	96,831.00	141,000.00	141,000.00	
2 Excess Utilities	-	-	-	-	-	
3 Interest on Unrestricted Fund Investments	375.00	3,444.92	3,444.92	750.00	750.00	
4 Income - Transfer In from Other Funds	13,703.92	-	-	27,407.83	27,407.83	
5 Other Income - Tenants	600.00	4,368.14	4,368.14	1,200.00	1,200.00	
6 HAP Fraud Recovery & FSS Forfeitures	-	-	-	-	-	
7 Other Income - Bad Debt Collections	2,500.00	327.44	327.44	5,000.00	5,000.00	
8 Other Income - Laundry/Copy Fees/Misc	-	-	-	-	-	
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	69,750.00	72,976.18	72,976.18	139,500.00	139,500.00	
13 ROSS/CFP Grant	-	-	-	-	-	
14 HAP Subsidy	-	-	-	-	-	
15 Operating Subsidy	-	-	-	-	-	
Total Income	157,428.92	177,947.68	177,947.68	314,857.83	314,857.83	

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
Administrative Expenses						
16 Admin Payroll Expenses	32,776.27	34,654.68	34,654.68	65,552.53	65,552.53	
17 FSS Coordinator Admin Salaries	-	-	-	-	-	
18 FSS Coordinator Admin Benefits	-	-	-	-	-	
19 Advertising & Marketing	25.00	48.49	48.49	50.00	50.00	
20 Legal	750.00	820.00	820.00	1,500.00	1,500.00	
21 Staff Training	-	-	-	-	-	
22 Travel	-	-	-	-	-	
23 Accounting Consultants	3,150.00	2,910.00	2,910.00	6,300.00	6,300.00	
24 Audit Fee	5,500.00	13,630.00	13,630.00	11,000.00	11,000.00	
25 Telephone	-	-	-	-	-	
26 Postage	-	-	-	-	-	
27 Office Supplies	130.00	385.85	385.85	260.00	260.00	
28 Memberships & Publications	-	-	-	-	-	
29 Bank Fees	25.00	-	-	50.00	50.00	
30 Computer Maintenance	-	-	-	-	-	
31 Copier Expenses	-	-	-	-	-	
32 Office Equipment Maintenance	-	-	-	-	-	
33 Postage Machine	-	-	-	-	-	
34 Software Maintenance	1,658.94	1,996.18	1,996.18	3,317.87	3,317.87	
35 Outgoing Portable Admin Fees	-	-	-	-	-	
36 Sundry Administration/Compliance Fees/TP	2,812.50	4,273.92	4,273.92	5,625.00	5,625.00	
37 Port-In HAP Expense	-	-	-	-	-	
38 Management Fees	7,413.89	7,910.39	7,910.39	14,827.78	14,827.78	

39	Eviction & Collection Agent Fees	-		-			-
40	HAP Expense (net fraud recovery to HUD)	-		-			-
	HAP Overfunding (Underfunding)	-					-
	Maintenance Expenses	-					
42	Maintenance Payroll Expenses	35,414.92	40,045.67	40,045.67	70,829.84		70,829.84
43	Casual Labor - Maintenance	-		-			-
44	Maintenance Materials & Supplies	4,000.00	3,593.64	3,593.64	8,000.00		8,000.00
45	Plumbing Supplies	-		-			-
46	Locks, Locksets & Keys	-		-			-
47	Electrical Supplies	-		-			-
48	Painting Supplies	-		-			-
49	Cleaning Supplies	-		-			-
50	Equipment Repair Parts	-		-			-
51	Maintenance Contracted Services	6,000.00	12,410.66	12,410.66	12,000.00		12,000.00
52	Refuse Removal Services	1,500.00	3,257.00	3,257.00	3,000.00		3,000.00
53	Plumbing Repair Services	-		-			-
54	Heating/AC Repair Services	600.00	124.00	124.00	1,200.00		1,200.00
55	Electric Repair Service	-		-			-
56	Window Repair Service	-		-			-
57	Automotive Repairs/Fuel	1,260.84	1,124.68	1,124.68	2,521.68		2,521.68
58	Elevator Repair & Maintenance	1,375.00	2,488.97	2,488.97	2,750.00		2,750.00
59	Pest Control Services	250.00	700.00	700.00	500.00		500.00
60	Cable TV	875.00	4,107.29	4,107.29	1,750.00		1,750.00
61	Answering Service	-		-			-
62	Misc Contracts	-		-			-
63	Clean/Paint Units	-		-			-
	Utilities Expenses	-					
64	Water/Sewer	4,250.00	2,946.80	2,946.80	8,500.00		8,500.00
65	Electricity	9,000.00	8,803.44	8,803.44	18,000.00		18,000.00
66	Natural Gas	4,500.00	4,995.26	4,995.26	9,000.00		9,000.00
	Other Operating Expenses	-					
67	Protective Services Contract	5,500.00	3,351.44	3,351.44	11,000.00		11,000.00
68	Insurance	8,185.31	8,011.98	8,011.98	16,370.61		16,370.61
69	PILOT	5,750.00	7,924.92	7,924.92	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	4,350.00	5,216.98	5,216.98	8,700.00		8,700.00
74	Casualty Losses - Non Capitalized	-		-			-
75	Capital Expenditures	-		-			-
76	Transfer In / Out	-		-			-
	Total Expense	147,052.66	175,732.24	175,732.24	294,105.31	-	294,105.31

Net Income/(Loss):

2,215.44 2,215.44

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

0.22

Cash Flow Statement
Beloit Housing Authority
Phase 2
As of 6/30/2023

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<i>Income</i>				
Dwelling Rent/Utilities	96,831.00	141,000.00	68.67%	(44,169.00)
Interest on Investments	3,444.92	750.00	459.32%	2,694.92
Other Income	77,671.76	145,700.00	53.31%	(68,028.24)
HUD Admin Fees		-		-
HUD Grants/Subsidies		27,407.83		(27,407.83)
Total Income	177,947.68	314,857.83		(136,910.15)

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<i>Expenses</i>				
Administrative				
Salaries/Benefits	34,654.68	65,552.53	52.87%	30,897.85
Office Expenses	24,064.44	24,785.00	97.09%	720.56
Office Contracted Services		3,317.87		3,317.87
Oper Sub Transfer/Mgmt Fee P	7,910.39	14,827.78	53.35%	6,917.39
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	40,045.67	70,829.84	56.54%	30,784.17
Materials & Supplies	3,593.64	8,000.00	44.92%	4,406.36
Maintenance Contracts	24,212.60	23,721.68	102.07%	(490.92)
Utilities	16,745.50	35,500.00	47.17%	18,754.50
Other Operating				
Protective Services	3,351.44	11,000.00	30.47%	7,648.56
Insurance	8,011.98	16,370.61	48.94%	8,358.63
PILOT	7,924.92	11,500.00	68.91%	3,575.08
Other Operating Expenses	5,216.98	8,700.00	59.97%	3,483.02
Total Expenses	175,732.24	294,105.31		118,373.07

Net Admin Income (Loss)	2,215.44
Net HAP Income (Loss)	
Total YTD Income (Loss)	2,215.44
Housing Authority's Portion	<u>0.22</u>

Consolidated 2023 Budget Report for Housing Choice Voucher - As of June 30, 2023

	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	1,680.00	1,955.84	1,955.84		3,360.00	3,360.00
4	Income - Transfer In from Other Funds	-		-			-
5	Other Income - Tenants/Landlords	-	367.00	367.00			-
6	HAP Fraud Recovery & FSS Forfeitures	375.00	1,763.00	1,763.00		750.00	750.00
7	Other Income - Bad Debt Collections	-		-			-
8	Other Income - Laundry/Copy Fees/Misc	15,440.30	16,112.00	16,112.00		30,880.60	30,880.60
9	Other Income - CFP Operation Money	-		-			-
10	Other Income - Sale of Asset Gain/Loss	-		-			-
11	Admin Fees Earned - HUD	162,012.00	164,330.00	164,330.00		324,024.00	324,024.00
12	Incoming Billable Admin Fees/Oper Sub	1,000.00	1,644.84	1,644.84		2,000.00	2,000.00
13	ROSS/CFP Grant	-		-			-
14	HAP Subsidy	1,457,500.00	1,548,409.00	1,548,409.00		2,915,000.00	2,915,000.00
15	Operating Subsidy	-		-			-
	Total Income	1,638,007.30	1,734,581.68	1,734,581.68	-	3,276,014.60	3,276,014.60
	Expenses	Approved YTD	HCV	HCV Total		HCV	Total
	Administrative Expenses						
16	Admin Salaries	100,258.25	90,735.91	90,735.91		200,516.49	200,516.49
17	FSS Coordinator Admin Salaries	-		-			-
18	Admin Employee Benefits	35,062.18	28,748.74	28,748.74		70,124.36	70,124.36
19	FSS Coordinator Admin Benefits	-		-			-
20	Advertising & Marketing	25.00		-		50.00	50.00
21	Legal	250.00		-		500.00	500.00
22	Staff Training	875.00		-		1,750.00	1,750.00
23	Travel	125.00	119.89	119.89		250.00	250.00
24	Accounting Consultants	2,882.00	3,055.00	3,055.00		5,764.00	5,764.00
25	Audit Fee	5,500.00	5,795.00	5,795.00		11,000.00	11,000.00
26	Telephone	555.35	658.66	658.66		1,110.70	1,110.70
27	Postage	-		-			-
28	Office Supplies	1,000.00	850.63	850.63		2,000.00	2,000.00
29	Memberships & Publications	350.00	324.22	324.22		700.00	700.00
30	Bank Fees	2,106.10	2,148.97	2,148.97		4,212.20	4,212.20
31	Computer Maintenance	-		-			-
32	Copier Expenses	952.90	1,384.30	1,384.30		1,905.80	1,905.80
33	Office Equipment Maintenance	-		-			-
34	Postage Machine	1,750.00	1,872.26	1,872.26		3,500.00	3,500.00
35	Software Maintenance	2,875.00	2,184.36	2,184.36		5,750.00	5,750.00
36	Outgoing Portable Admin Fees	-		-			-
37	Sundry Administration/Compliance Fees	1,750.00	6,662.27	6,662.27		3,500.00	3,500.00
38	Port-In HAP Expense	-	16,112.00	16,112.00			-
39	Management Fees	-		-			-

40	Eviction & Collection Agent Fees	-		-			
41	HAP Expense (net fraud recovery to HUD)	1,436,664.00		1,541,276.00	1,541,276.00	2,873,328.00	2,873,328.00
	HAP Overfunding (Underfunding)	21,211.00		8,896.00		42,422.00	42,422.00
	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	250.00		-		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	178.50		-		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	1,249.05		1,105.96	1,105.96	2,498.10	2,498.10
70	PILOT	-		-			-
71	Compensated Absences	-		-			-
72	Collection Losses	-		-			-
73	Replacement Reserves & Debt Pmt-Princ	-		-			-
74	Other General Expense/Asset Mgmt Fees	2,200.00		-		4,400.00	4,400.00
75	Casualty Losses - Non Capitalized	-		-			-
76	Capital Expenditures	-		-			-
77	Transfer In / Out	-		-			-
	Total Expense	1,618,069.33		1,703,034.17	1,703,034.17	-	3,193,716.65
							3,236,138.65

Net Income/(Loss):

31,547.51

**Cash Flow Statement
Beloit Housing Authority
Housing Choice Voucher
As of 6/30/2023**

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<i>Income</i>				
Dwelling Rent/Utilities		-		-
Interest on Investments	1,955.84	3,360.00	58.21%	(1,404.16)
Other Income	16,479.00	33,630.60	49.00%	(17,151.60)
HUD Admin Fees	164,330.00	324,024.00	50.72%	(159,694.00)
HUD Grants/Subsidies	1,551,816.84	2,915,000.00	53.24%	(1,363,183.16)
Total Income	1,734,581.68	3,276,014.60		(1,541,432.92)

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<i>Expenses</i>				
Administrative				
Salaries/Benefits	119,484.65	270,640.85	44.15%	151,156.20
Office Expenses	19,614.64	30,836.90	63.61%	11,222.26
Office Contracted Services	5,440.92	11,155.80	48.77%	5,714.88
Oper Sub Transfer/Mgmt Fee Pd		-		-
Housing Assistance Pmts	1,541,276.00	2,873,328.00	53.64%	1,332,052.00
HAP Payments Port In	16,112.00		0.00%	(16,112.00)
Maintenance				
Salaries/Benefits		-		-
Materials & Supplies		-		-
Maintenance Contracts		857.00	0.00%	857.00
Utilities		-		-
Other Operating				
Protective Services		-		-
Insurance	1,105.96	2,498.10	44.27%	1,392.14
PILOT		-		-
Other Operating Expenses	-	4,400.00	0.00%	4,400.00
Total Expenses	1,703,034.17	3,193,716.65		1,490,682.48

Net Income/(Loss): 31,547.51

2024 CDBG Application Summaries

Public Service Applications						
	Name of Agency	Name of Project	2023 CDBG Award	2024 Grant Dollars Requested	Project Description	Proposed Beneficiary Accomplishments with CDBG funds
1	Beloit City Wide Youth Softball League	2024 BCWYS League Season	N/A (new applicant)	\$15,000	The Beloit City Wide Youth Softball League offers a free softball league for youth ages 7-17. The season runs from June through August with weekly games and practices held in the City of Beloit. This league is run by volunteers. All equipment is provided for the players. Food is also provided for all registered players at each game, free of charge. In the 2023 season, over 300 youth were registered for the league. Our target population is low-income, at-risk youth ages 7-17 in the Greater Beloit area.	800
2	Beloit Meals on Wheels	Home Delivered Meals Assistance	\$7,890	\$15,000	This program serves residents living in the City of Beloit by providing daily, nutritious meals to homebound elderly, ill, and/or disabled people. This will assist these clients to stay in their homes thus stabilizing neighborhoods with owner occupied properties. The funding would help subsidize meal costs for the program.	200
3	Family Promise of Greater Beloit	Emergency Shelter for Families Facing Homelessness	\$16,390	\$35,000	There are two components to this program. The first is to provide wages for case management staff. They will work with homeless families to help them become self-sufficient through helping them find employment, housing, education, and mental and physical health services. The second component is rent assistance for either families who are at the brink of eviction or to provide them with security deposits or first month's rent.	250
4	HealthNet of Rock County, Inc.	Expanding Primary, Dental and Behavioral Healthcare to Beloit Residents	\$7,890	\$25,000	This program provides free medical and dental care to low-income and completely uninsured Beloit residents. Funding would be used to cover direct program costs.	90
5	Messiah Lutheran Church Food Pantry	Food Pantry	N/A (new applicant)	\$12,500	This program is a non-profit food pantry which provides food, hygiene items, and other necessary items to LMI Beloit residents. The food pantry is located on the west side of Beloit. CDBG funds would be used to cover direct program costs (food, hygiene products, paper products).	320
6	Project 16:49	Robin House Transitional Living Program	\$7,890	\$15,000	This program provides transitional housing, case management, and supportive services to allow participants to complete their high school education and increase their self-sufficiency as they transition to adulthood. CDBG funds would be used subsidize the wages of the case manager and direct program services.	145

7	Stateline Literacy Council	Adult Education for Economic Opportunity	\$9,890	\$14,000	This project provides literacy services to English and non-English speaking adults with limited basic skills and limited proficiency in English. The students will gain at least the minimum education level to qualify for a job above minimum wage and/or to increase their job skills by increasing their community levels. Basic computer literacy will be offered and onsite childcare will be provided. CDBG funds would be used to subsidize personnel costs for instructors.	75
8	The Salvation Army	Supportive Services	\$7,890	\$12,000	This program is intended to provide rental assistance to clients. Case Management will be offered in conjunction but the CDBG funds would be used for Rental Assistance only. These services will not be limited to a particular group of clients (i.e. single adults with no children, survivors of DV, or college students).	23
9	The Youth Unite	Brain Enhancement and Arts Education for the Merrill and Hackett Neighborhoods	N/A (new applicant)	\$24,215	Our program will give youth programs in the Arts that have longevity where they can bond and feel a part of a productive, growing community. Practicing the Arts is proven to support good mental health, and our program provides opportunities to provides space and activities for after-school children who don't otherwise have supervised extra-curricular activities.	3200
10	ECHO	Emergency Rent Assistance	\$7,890	\$15,000	ECHO would spend the requested funds to provide direct rent assistance for low-income residents of the City of Beloit. The program will assist those who are behind in their rent and would become homeless without the funds, those who are are homeless, and those clients who have an eviction notice.	16
11	Family Services	Defy Domestic Abuse Beloit	\$9,890	\$10,000	This program is dedicated to the purpose of facilitating persons toward housing stability through short-term emergency housing and related services. The funding would be used to enhance the case management component of the services provided to improve success rates of families that have been displaced due to domestic violence.	88
			Total PS Request:	\$167,715		

NRSA Public Service Applications						
	Name of Agency	Name of Project	2023 CDBG Award	2024 Grant Dollars Requested	Project Description	Proposed Beneficiary Accomplishments with CDBG funds (individuals)
1	ECHO	Emergency Rent Assistance (NRSA)	\$8,000	\$15,000	ECHO would spend the requested funds to provide emergency rent assistance, security deposits, and/or utility assistance for low-moderate income residents in the Hackett and Merrill neighborhoods.	16
2	Family Services	Neighborhood Resilience Project	\$47,500	\$50,000	The Community Social Worker determines the professional needs of NRSA residents and facilitates their connection to long-term professional case management, mental health counseling, or medical care, and provide follow-up case management until the resident can be fully supported.	800
3	Community Action, Inc. of Rock and Walworth Counties	Merrill Community Center	\$15,000	\$15,000	The Merrill Community Center Program will offer both youth and senior programs. The Youth program will focus on afterschool & summer programming for youth ages 6-18 that reside in the Merrill Neighborhood. The Senior Program will offer older adults a place to be where they can feel connected to their community and a sense of independence.	168
4	Community Action, Inc. of Rock and Walworth Counties	Resources Navigator	\$47,500	\$50,000	This program provides funds for a Resources Navigator that provides assistance to residents living in the two NRSA neighborhoods by analyzing the needs of the household and providing resource referral services by facilitating and managing the coordination of agency and community resources available.	30
5	Legal Action of Wisconsin, Inc.	Community Lawyer Project	N/A (new applicant)	\$50,000	Our Community Lawyer will provide legal assistance to and educate City of Beloit residents that are low- and moderate-income.	252
6	Pearl Transit Corp	Oral health outreach for low income residents	N/A (new applicant)	\$30,000	Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide the following benefits for our consumers: (1) improving personal appearance, speech, and confidence, (2) providing a restorative option that offers minimal person to person contact and no dentist office visit, (3) encouraging better health by allowing the denture user a range of nutritive foods that they can consume, (4) improving overall oral health by reducing the risk of periodontal disease and tooth decay associated with missing teeth.	1,300
Total NRSA Request:				\$145,000		

Economic Development Applications

	Name of Agency	Name of Project	2023 CDBG Award	2024 Grant Dollars Requested	Project Description	Proposed Beneficiary Accomplishments
1	Wisconsin Women's Business Initiative Corporations	Job Title: Business Owner	\$50,000 in carry-over from 2022 (no new 2023 CDBG funds awarded)	\$50,000	Loans will be issued through Revolving Loan Fund to Beloit small businesses and microenterprises	30
			Total Economic Development Request:	\$50,000		

City Programs - Non-Competitive

	Name of Agency	Name of Project	2023 CDBG Award	2024 Grant Dollars Requested	Project Description	Proposed Beneficiary Accomplishments
1	City of Beloit	Fair Housing	\$2,712	\$5,000	This funding will be used to contract services for fair housing outreach, education, investigation, and mediation in the City of Beloit in order to achieve equal opportunity for housing.	33 Residents (FH complaint investigations + outreach)
2	City of Beloit	Code Enforcement/Inspection Program	\$164,100	\$175,000	This program was developed to maintain and improve safe, decent, and sanitary living conditions, and maintaining and increase property values in order to improve the quality of life in Beloit. The funding requested will assist in covering a portion of the cost to maintain the current level of Inspection Officials. Without the current staffing level, the workload would become overwhelming and would affect responsiveness to the needs of Beloit's citizens.	18,360 Households
3	City of Beloit	Housing Rehabilitation & Demolition Program	\$144,847	\$150,000	This program has three components. Firstly, low-to-moderate income families are offered assistance to make necessary repairs or improvements to their property. Secondly, landlords have access to loans to rehabilitate their units that will be rented to low-to-moderate income families. Lastly, there will also be an option for demolition of vacant, blighted structures.	10 Households
4	Community Action Inc. on behalf of COB	Merrill Neighborhood Clean-up Event	\$4,000	\$4,000	Community Action, Inc. organizes a neighborhood clean-up event in the Merrill neighborhood to provide an opportunity for residents to safely dispose of household items. Some examples include old tires, televisions 20" and under, and old computers.	60
5	Community Action Inc. on behalf of COB	Hackett Neighborhood Clean-up Event	\$4,000	\$4,000	Community Action, Inc. organizes a neighborhood clean-up event in the Hackett neighborhood to provide an opportunity for residents to safely dispose of household items. Some examples include old tires, televisions 20" and under, and old computers.	60

A. Applicant and Project Information Summary

Case Id: 30186
Name: Beloit City Wide Youth Softball - 2024
Address: 2434 S. Dewey Ave, Beloit, WI 53511

Completed by 4chmie@gmail.com on 7/3/2023 1:38 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Beloit City Wide Youth Softball League

A.2. Organization Address

2434 S. Dewey Ave Beloit, WI 53511

A.3. Phone Number

(608) 295-9769

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #

applied for

A.6. Agency CAGE/SAM #

applied for

A.7. Executive Director/Chairperson

Brian Elliott

A.8. Email Address

belliott42@yahoo.com

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

No

PROJECT INFORMATION

A.11. Project Name

2024 BCWYS League Season

PRIMARY CONTACT #1

A.12. First Name

Brian

A.13. Last Name

Elliott

A.14. Email Address

belliott@yahoo.com

A.15. Phone Number

(608) 295-9769

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Patricia

A.17. Last Name

Majeed

A.18. Email

pmajeed1220@yahoo.com

A.19. Phone Number

(608) 751-4640

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by 4chmie@gmail.com on 7/3/2023 1:38 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

This is a free softball league for youth ages 7-17. The season runs from June through August with weekly games and practices held in the City of Beloit. This league is run by volunteers. All equipment is provided for the players. Food is also provided for all registered players at each game, free of charge. In the 2023 season, over 300 youth were registered for the league. Our target population is low-income, at-risk youth ages 7-17 in the Greater Beloit area.

C. Project Type

Completed by 4chmie@gmail.com on 7/3/2023 1:39 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 25

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Our softball league serves youth 7-17 years old.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by 4chmie@gmail.com on 7/3/2023 1:42 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

The softball league serves low income families. We have served the homeless population in the past.

E. Conflict of Interest

Completed by 4chmie@gmail.com on 7/3/2023 1:41 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by 4chmie@gmail.com on 7/4/2023 9:11 AM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

Beloit City Wide Youth Softball BOD 2023.docx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Article of Organization BCWYS.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

501 3 (c) (1) (1) Citywide Softball.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Letter of Approval BCWYS 6.2023.PDF

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 25

the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required

Larisa Apply for CDBG.docx

Organizational Chart – Include only one copy

An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required

Organizational Chart non avail BCWYS.docx

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Audit non avail BCWYS.docx

G. Funding Priorities

Completed by 4chmie@gmail.com on 8/11/2023 5:05 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The Beloit City Wide Youth Softball League provides a free program offering youth 7-17 a place to play softball learning

the fundamentals of the game, teamwork, and sportsmanship with the guidance of coaches and other volunteers. There is no income eligibility to participate. The season starts in June with a 3 evening softball fundamentals camp followed by weekly practices and games at City of Beloit parks.

All equipment and uniforms are provided free of charge. This includes gloves, helmets, bats, balls, and face masks. In 2023, over 380 youth registered and played from June through August with other youth their age. The two younger groups who play on Saturdays also receive a free light lunch served by volunteers. Our participants are racially diverse with the majority being Black, Latinx, and Hispanic. Our diverse leadership includes coaches, board members and other volunteers who offer the youth access to mentors and community leaders. Coaches are to encourage player development, good sportsmanship, self respect and respect of ones team.

The positive atmosphere for the youth participating helps with their self esteem and self worth. These young people have a better chance of becoming productive giving members of society by their interactions with positive, kind and giving mentors including coaches.

H. Agency Summary

Completed by 4chmie@gmail.com on 8/12/2023 10:31 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

The founding directors started the non-profit Beloit City Wide Youth Softball League in 2016 and incorporating in 2023. The league was started out of necessity. At that time, there was no baseball/softball program that was affordable for low income and/or single parent families in the area. In that first year, 90 youth registered ages 7-13 and in 2023, over 380 youth registered ages 7-17. These youth have played softball on city ball diamonds at no cost to the players. Players are provided all the equipment necessary to play safely and have fun as well as uniforms for each team.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

In the summer of 2022, it came to our attention that there is no affordable softball/baseball program for the youth who had aged out of our program at 14. So, in 2023, we added to our program by starting teams of 14-17 year olds. Up until then, the Beloit City Wide Youth Softball leagues were only for youth up to age 13. With this expansion comes greater expenses. Now, we have three separate leagues within our organization according to age. Each of these groups need different size equipment like helmets, gloves, masks and bats. As the league continues to expand, there is greater need for more equipment. Each year, all players are offered a free glove which means that every year we are re-stocking our equipment for new and growing players. We accept donations of equipment as long as it is in working order. We also feed the younger leagues a light lunch. With this comes more expense as food prices increase. We need to purchase grills, coolers and tents. The current ones we use are either borrowed or need replacing.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Since 2016 when our program started, the numbers of registrants increased every year. This shows there is interest, need, and support of the program and what we offer the community at large. Affordable physical activity in a positive and fun environment with supportive adult mentors is needed in the City of Beloit for all youth. The numbers from both the federal government and the city of Beloit support why our program is growing.

The federal census website shares estimations for the city of Beloit in 2022. On this site, it states that there are approximately 21% Hispanic/Latinx and 14% Black residents. In the entire city of Beloit, the census approximate of persons under the age of 18 is 26% of the population. The majority of our participants are people of color, under the age of 18.

In addition, we know that a great percentage of our participants live in the Neighborhood Revitalization Strategy Areas

Printed By: Brian Gile on 8/16/2023

12 of 25

(NRSA) area of the Hackett and Merrill Communities outlined in the City of Beloit's NRSA Plan. In their plan, it states that for this area in Beloit, 70-74% of the residents are in the low to moderate income bracket in comparison to 52% of the entire city of Beloit. Persons living in poverty in these outlined areas, according to this document, are 37-40%, compared to 25% of the entire city of Beloit.

People living with low to moderate income cannot afford other baseball/softball programs in the area. This is why we believe our program is so successful in gaining registrants every year; There is a great unmet need. Our program participants and volunteers are ethnically diverse, but the majority are Black, Hispanic/Latinx or mixed.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

As stated previously, we have expanded the age of the youth who can participate. Previously only allowing youth to age 13, we now allow youth up to the age of 17 a place to play softball at no cost in the City of Beloit. By adding this third group of youth, our expenses have increased by a minimum of 30% this year. Each age group needs different size equipment. This also means the need for even more volunteers to coach.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

Our program is currently the only one of its kind offering a no-cost softball league for youth ages 7-17 in the Greater Beloit area. No one has to apply for a scholarship, everyone is free upon registering. Our program is racially and economically diverse. Anyone ages 7-17 can register to play as long as they live in Beloit, Wisconsin. We are run by volunteers including coaches and board members. All equipment and uniforms are provided free of charge. In addition, a light lunch is provided to the two younger leagues' registered players on Saturdays by volunteers and for all participants at our annual all day tournament at the end of the season. We collaborate with the Beloit School District and Community Action to ensure youth who are eligible know about our program.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

The Beloit City Wide Youth Softball League works with the City of Beloit Parks Department for the use of the city ball fields. The Stateline Community Foundation and Hendricks Foundation have supported the program financially. Merrill Community Center and the Beloit City School District assist in marketing the program to the families and youth eligible to play. Community Action has helped purchase our uniforms for the past couple of years. New Zion Baptist Church has donated their property for the annual softball fundamentals camp. In addition, we have a diverse group of business supporters including Clippers & Curls, Altra Industries, State Farm Insurance Agent Terri Sminchak, American Family Insurance Agent Shannon Ahrens, Beloit Floral, Hiram Power and Electric, Hereford Fireworks, Hansen Gravitt Funeral Home, Blackhawk Technical College, Tigre USA, Campbells, Father and Sons, All State Insurance Agent Mary Anne Carroll, Tobacco Shack, Alarm Box and the Rising Queens. Many of these businesses help sponsor one of our youth teams and get their logo on the back of a team's T-shirts. These sponsors all help in advertising our program to the community.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

The Beloit City Wide Youth Softball League works with the Beloit School District to distribute fliers at all of the schools in the spring. These fliers outline the program, its benefits, and how to get involved. In addition, the Merrill Community Center works with us to market the program to their participating youth. The Beloit Daily News has done a featured article each year during our registration to get the word out. Our business sponsors, as well as organizations like Caritas

Food Pantry are also willing to have our fliers available to help reach the youth who would benefit from our leagues.

I. Project Summary

Completed by 4chmie@gmail.com on 8/11/2023 5:25 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

Beloit youth ages 7-17 of all ethnicities and genders will be served. A majority of participants are Black, Latinx and Hispanic. In addition, most participants come from low income and/or single parent homes. These families cannot afford the other softball/baseball programs offered in the City of Beloit and surrounding vicinity.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Start marketing the program in the schools in mid to late March.	0	0	\$0.00
Q2 4/1/24-6/30/24	Open registration on the website. Offer the Softball Fundamental Camp in early June for all registrants. Softball games start in mid-June and run through mid-August.	400	300	\$13,000.00
Q3 7/1/24-9/30/24	Weekly ball games and annual tournament in August offering free light meal.	400	300	\$2,000.00
Q4 10/1/24-12/31/24		0	0	\$0.00
				\$15,000.00

I.3. How will you measure the success of the program? (2 points)

The success of our program is measured by the number of returning participants. In addition, our success can be tracked by the increase in registrants each year. Community and business support each year increases as well, which can also be a program success marker.

Printed By: Brian Gile on 8/16/2023

15 of 25

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

Each participant is invited to come back for the next summer's program. They are encouraged by their coaches to return to their teams for the next season.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	3	2	3	2	3	2
51-80% CMI	15	12	27	23	27	23
31-50% CMI	62	55	100	95	100	95
0-31% CMI	220	190	250	220	270	250

J. Project Budget

Completed by 4chmie@gmail.com on 8/14/2023 4:20 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Equipment(gloves,helmets, catcher gear, bats, balls)	\$8,200.00
Uniforms (shirts/hats)	\$2,800.00
Supplies(food)	\$4,000.00
Total	\$15,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
------	-------	---------------------	----------------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Uniforms(additional cost to requested CDBG funds)	\$8,000.00
Supplies (food)(additional cost to requested CDBG fund)	\$5,000.00
Equipment (bats,balls,helmets,gloves,catcher gear)(additional cost to requested CDBG funds)	\$2,000.00
Umpires	\$5,000.00
Score Keeper	\$1,600.00
Printing/copying	\$1,500.00
Insurance	\$1,000.00
Storage Shed rental	\$880.00
P.O. Box	\$250.00
Cook	\$800.00

Supplies(Coolers,tents,grills)	\$2,000.00
Total	\$28,030.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$0.00	\$0.00	\$15,000.00
Contributions	\$16,000.00	\$17,000.00	\$16,000.00
Foundations & Venture Grants	\$11,300.00	\$9,100.00	\$11,600.00
Special Events	\$9,200.00	\$8,300.00	\$5,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$0.00	\$0.00	\$0.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00

All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$36,500.00	\$34,400.00	\$47,600.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$0.00	\$0.00	\$0.00
Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$0.00	\$0.00	\$0.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$20,940.00	\$29,000.00	\$32,000.00

Telephone	\$0.00	\$0.00	\$0.00
Postage	\$250.00	\$250.00	\$250.00
Occupancy (building grounds utilities)	\$0.00	\$0.00	\$0.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$1,500.00	\$1,500.00	\$1,500.00
Mileage for Staff	\$0.00	\$0.00	\$0.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00
Misc. Expenses (not otherwise listed)	\$10,079.00	\$14,280.00	\$15,250.00
Total Expenses (Before Depreciation)	\$32,769.00	\$45,030.00	\$49,000.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
--	--------------------------------	-----------------------------------	----------------------------------

(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
-----------------------	--------	---------------------	--

K. Agency Capacity

Completed by 4chmie@gmail.com on 8/11/2023 5:26 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

The Beloit City Wide Youth Softball League started their program in 2016, serving the community of Beloit for 8 seasons/years of softball.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

The grant writer, Larisa Chmielewski, has some experience with state grant awards as a previous Executive Director of a non-profit organization for nine years. We plan on having Megan McBride and Brian Gile of the City of Beloit assist us in setting up a program which will help the Directors in the administering of these funds. Our accountant, Rosanna Lockwood is also willing to set up programs to keep track of the CDBG funds.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by 4chmie@gmail.com on 8/11/2023 5:30 PM

Case Id: 30186

Name: Beloit City Wide Youth Softball - 2024

Address: 2434 S. Dewey Ave, Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Patricia Majeed, Brian Elliott and Scottie Davidson, all founding directors and well-known respected residents of Beloit, will be responsible for overseeing the implementation of this program. They are passionate about the success of their program which is seen in the growing numbers of businesses and individuals. They will provide the required reports with the help of our accountant, Rosanna Lockwood. They will oversee and insure that all aspects of the program will be completed.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

The board member responsible for the financial reports is Patricia Majeed. She works directly with accountant Rosanna Lockwood. At this time, we do not have any experience in administering federal funds and will need guidance from the City of Beloit staff, Megan McBride and Brian Gile.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

Our board member, Patricia Majeed and accountant Rosanna Lockwood will keep files detailing where specifically the CDBG funds go. They will have guidance from the City of Beloit staff Megan McBride and Brian Gile on best practices.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

At softball registration, all participants will have to fill out a form which will include all of the required tracking information. Every participant will have their own form. The completed registration form will be required for the youth to be eligible to play for the 2024 season.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Forms are being created using other agencies templates to verify and document the U.S. legal status of our participants. We will have two or three board members who will verify the documentation of each participant and sign affidavits to that effect.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

The required registration form will include the address of each participant. Only those living in the city limits will benefit from the CDBG funds.

Printed By: Brian Gile on 8/16/2023

24 of 25

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30178
Name: Beloit Meals On Wheels, Inc. - 2024
Address: 1534 Shore Drive, Beloit, WI 53511

Completed by ellen@beloitmealsonwheels.org on 6/27/2023 5:01 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Beloit Meals On Wheels, Inc.

A.2. Organization Address

1534 Shore Drive Beloit, WI 53511

A.3. Phone Number

(608) 362-3683

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #

DZ7ZKMCNN7M8

A.6. Agency CAGE/SAM #

883G9

A.7. Executive Director/Chairperson

Ellen Wiegand

A.8. Email Address

ellen@beloitmealsonwheels.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

6

PROJECT INFORMATION

A.11. Project Name

Program Assistance for Home Delivered Meals

PRIMARY CONTACT #1

A.12. First Name

Ellen

A.13. Last Name

Wiegand

A.14. Email Address

ellen@beloitmealsonwheels.org

A.15. Phone Number

(608) 362-3683

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Ellen

A.17. Last Name

Wiegand

A.18. Email

A.19. Phone Number

B. National Objectives

Completed by ellen@beloitmealsonwheels.org on 7/6/2023 2:15 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

The Beloit Meals On Wheels program serves and meets the needs of low-moderate limited homebound elderly clients, who are 60 years and older and living in Beloit.

C. Project Type

Completed by ellen@beloitmealsonwheels.org on 7/6/2023 2:24 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition,

- Subsistence Payments (one time or short term emergency payments on behalf of clients.)
- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

construction, reconstruction, rehabilitation, or installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)
n/a

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Our program fits into the Senior Services category and impacts the community by improving nutrition for our City of Beloit elderly neighbors who face the threat of hunger and social isolation. Fulfilling this basic need “a well-balanced and nutritious meal” delivered every day, improves their overall health. But we provide more than just a hot meal – we provide a friendly visit and a daily safety check that accompanies each meal. This provides a vital safety net to nutritionally at-risk seniors in the City of Beloit community. When seniors can stay in their own homes and out of nursing homes, it saves tax-payer dollars, thus keeping the neighborhood strong and intact. Whereas, if they had to prematurely relocate to a nursing home, the home would be vacated, family may not be around to take care of the home, and the neighborhood and property value would decline. Our nation’s senior population continues to grow exponentially. 1 in 5 Americans is 60 years and older, with 12,000 more turning 60 each day. This population is set to reach 118 million by 2060 more than double the number in 2020 – leaving more and more Americans at risk for hunger and isolation. Nationally, 1 in 4 seniors lives alone and while hunger and isolation can affect anyone with limited mobility and declining health, financial strain makes them much worse. Older adults living in poverty are nearly twice as likely as those living above poverty level to have limitations in their ability to live independently. A low to no cost meal each day can alleviate the worry caused by this financial strain. In the Greater Beloit area, almost 23% of Beloit residents

Printed By: Brian Gile on 8/16/2023

are 60 years or older.

D. Consolidated Plan Goal

Completed by ellen@beloitmealsonwheels.org on 7/7/2023 12:08 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

Our program addresses the homeless services goal by providing the necessary nutrition and supportive resources to Beloit homebound seniors to help them remain in their homes where they want to be. By delivering a healthy meal and much needed human connection, our program stabilizes and keeps our neighborhoods safe and healthy and also improves the quality of life of our seniors. Our homebound seniors are vulnerable, isolated, and have limited mobility, but our program ensures that seniors have adequate nutrition and supportive resources. even when family support, mobility and resources are lacking.

E. Conflict of Interest

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

Completed by ellen@beloitmealsonwheels.org on 7/6/2023 3:04 PM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

Completed by ellen@beloitmealsonwheels.org on 7/7/2023 11:17 AM

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

2023 Board List.xlsx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles of Incorporation.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

501c3 Determination ltr-2014.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Authorization to request funds.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to

*negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

Authorized representative.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

BMOW Organizational Chart.xlsx

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

FINAL_Beloit Meals on Wheels Financial Statements 2021.pdf

G. Funding Priorities

Completed by ellen@beloitmealsonwheels.org on 8/7/2023 2:41 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

Beloit Meals On Wheels addresses the Public Service funding priority by providing the necessary nutritional support to

Printed By: Brian Gile on 8/16/2023

11 of 25

protect our elderly neighbors who face the threat of hunger and social isolation. These seniors struggle to access and prepare healthy food. Fulfilling this basic need, a nutritious meal delivered daily improves their overall health, helps them remain self-sufficient in their homes - which helps stabilize neighborhoods and reduce vacant and abandoned properties. Meals On Wheels is often the first service seniors seek when wanting to remain independent in their own homes, engaged in life and connected with the community.

H. Agency Summary

Completed by ellen@beloitmealsonwheels.org on 8/14/2023 4:44 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Our organization began back in 1971 when visionaries from local agencies saw a greater need for nutrition in the community and came together to do something about it. For over half a century our incredible core of volunteers have delivered meals 365 days a year and we are committed to ensure that homebound seniors have the resources they need to extend their independence and health as they age. We are a non-profit, 501c3 organization.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

We serve an incredibly vulnerable population and provide a lifeline to at-risk seniors by delivering daily nutritious meals and a safety check to help them remain independent and address senior hunger and social isolation. This funding will be used to provide direct program support to our seniors, including cost for meals, management of meal check-in, meal ordering and meal distribution, and client intakes and assessments.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

The demand for our service continues to grow. In the last five years, we have seen a 61% growth rate increase in the number of clients served, and a 68% growth rate increase in the number of meals served. There has been a drastic increase for the secondary evening cold meal option and weekend meals due to food insecurity, inflation, and the impacts of the COVID-19 pandemic. To meet this demand of serving more unserved and underserved seniors, we have recruited more volunteers and added more meal delivery routes. Seventy-eight percent of our clients live at very low or extremely low-income levels and our policy is to ask our clients to contribute to the cost of the meals with as their budget allows. Unfortunately, due to the high number of low income clients we serve, this often-times results in very little to no meal contributions by our clients. As a result, the cost for Beloit Meals on Wheels to meet the needs of this population only grows every year. Other demographics of our clients include 84% of our clients are Caucasian, 14% are Black, and 2% are Hispanic/Latino; 59% are female, 41% are male; and 75% live in the City of Beloit.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

We continue to see growth in our program and we have also improved our delivery service. Back in November 2022, we moved into our new sustainable and centralized facility which includes more working space for meal pickup to serve more seniors, a parking lot and protected canopy for loading and unloading meals for volunteer delivery. Since the 4th

quarter 2022, we have added four new delivery routes and recruited almost 100 new volunteers to deliver the meals.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

What makes Beloit Meals on Wheels unique is that we deliver nutritious meals and that needed safety check 365 days a year. Whereas Rock County Council on Aging provides home delivered meals to clients living in the outlining areas of Rock County (not including Beloit), they do not deliver on the weekends or on holidays. Having meals delivered every day of the year provides more than just nourishment. Every meal is personally delivered, creating the opportunity for our older neighbors to connect with the world beyond their front door. These reliable deliveries serve as an important check-in and provide a sense of comfort for isolated meal recipients, who often have no family or friends nearby.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

We work closely with RSVP when our clients need transportation to medical or other appointments. We work with local hospice agencies and in-home care providers when they have patients needing additional nutritional support. We have partnered with Wisconsin Contigo, an informational newsletter that focuses on providing information and resources Hispanic communities and conducted an English/Spanish interview on Facebook explaining our Meals on Wheels services. We have partnered with the Community Health Center sharing information about their sliding scale health care and provided them with "Enjoy a Meal On Us" meal coupons for their patients to try one of our meals. We have also shared our meal coupons with Homecare Pharmacy and the Beloit Public Library for them to include in their homebound medication and library service delivery in hopes of us reaching more underserved/unserved seniors in the community. Lastly, we collaborate with the Rock County Aging and Disability Resource Center, the Merrill Community Center, and the Stateline Literacy Council since they offer community programs for seniors.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

These entities mentioned in H.6 are great advocates of our program and we will continue to work with them in promoting nutritional wellness for seniors of the Beloit community. Additionally, we are actively involved with community events, and do fundraisers throughout the year with various businesses in Beloit who support and advocate on our behalf. We have great support from workplace partners which are businesses who not only provide volunteer drivers for meal delivery but also provide funds for specific projects. These businesses have been huge advocates of our program.

I. Project Summary

Completed by ellen@beloitmealsonwheels.org on 8/14/2023 4:11 PM

Case Id: 30178
Name: Beloit Meals On Wheels, Inc. - 2024
Address: 1534 Shore Drive, Beloit, WI 53511

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

Our program will focus on serving City of Beloit seniors, age 60 and over, who are considered homebound due to illness or disability and are food insecure due to limitations to obtain and prepare foods daily. Many of these recipients have multiple chronic health conditions and are often at high nutritional risk. In 2022, 73% of our clients were admitted to our program at high nutritional risk, determined by our nutritional assessment intake. We serve a high percentage of low-income seniors with 78% of our clients living at extremely low to very low income levels; 59% of our clients are female and 41% are male; average client length of stay is 473 days (1 year, 3 months), 75% of our clients are age 70 and over; 75% of our clients live in the City of Beloit.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31/24		0	0	\$0.00
Q2 4/1/24-6/30/24		0	0	\$0.00
Q3 7/1/24-9/30/24	funding will provide meal service program support for City of Beloit participants (1st - 3rd quarter)	200	160	\$15,000.00
Q4 10/1/24-12/31/24		0	0	\$0.00
				\$15,000.00

I.3. How will you measure the success of the program? (2 points)

We measure client success by conducting regular client assessments and client satisfaction surveys to evaluate our services and to determine how our program affects them. Back in June, we conducted our client satisfaction survey which resulted in a 73% response rate. Here's what our clients said: 97% said they look forward to seeing the

volunteer driver and the meals helped them live independently in their home; 95% said the meal program improved their quality of life; 94% said they eat healthier and helped maintain their overall health; and 78% said that having a meal delivered in-person offers someone to talk to which equates to decreased loneliness and isolation; and 2 out of 5 clients said that on most days the only person they see is the Meals on Wheels volunteer. We also complete a monthly service indicator report to track our growth and demographics in a way to measure our goals and outcomes.

What we intend to achieve through our project is to continue to provide that vital support and nutrition to our homebound clients. The staff and volunteers are the extra set of eyes and ears for our clients and by providing the food they need, and the human contact they desire, we see positive outcomes and notable improvements in their independence and health as they age.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

We conduct ongoing case management, along with formal periodic assessments, every six months or more often as needed to assess each client’s needs. These assessments not only address nutrition and meal eligibility, but they determine whether the client may require other additional support. We work closely with our clients, their loved ones, and local agencies to fulfill any unmet needs. We are an important and constant link to further senior resources in the community. We provide nutritional educational materials quarterly to our clients and offer our “Care Calls for Clients” program which is a volunteer-supported service in a way to provide a reassurance call from a friendly volunteer to reduce the feelings of loneliness, isolation, and promote social engagement.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	10	9	10	8	12	9
51-80% CMI	24	19	34	27	41	31
31-50% CMI	62	51	48	38	57	43
0-31% CMI	119	96	108	87	130	97

J. Project Budget

Completed by ellen@beloitmealsonwheels.org on 8/14/2023 4:25 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Program Support	\$15,000.00
Total	\$15,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Gail Wellnitz	Office Assistant	\$16,640.00	1300
Lyndsay Rochester	Program Assistant	\$7,055.00	565

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$10,000.00	\$7,900.00	\$15,000.00
Contributions	\$50,379.00	\$38,000.00	\$40,000.00
Foundations & Venture Grants	\$43,092.00	\$36,500.00	\$30,000.00
Special Events	\$77,414.00	\$90,500.00	\$95,000.00

Legacies & Bequests (unrestricted)	\$9,128.00	\$8,100.00	\$8,000.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$70,000.00	\$70,500.00	\$120,000.00
Blackhawk Region United Way	\$75,000.00	\$85,000.00	\$85,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$97,356.00	\$96,185.00	\$105,000.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$432,369.00	\$432,685.00	\$498,000.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$132,418.00	\$155,693.00	\$185,000.00
Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$11,406.00	\$12,820.00	\$15,000.00
Professional Fees	\$10,282.00	\$11,230.00	\$12,000.00
Supplies	\$159,980.00	\$204,812.00	\$234,000.00
Telephone	\$3,374.00	\$3,780.00	\$4,000.00
Postage	\$1,003.00	\$1,522.00	\$2,000.00
Occupancy (building grounds utilities)	\$18,502.00	\$16,590.00	\$17,000.00
Equipment Rental & Maintenance	\$11,227.00	\$7,140.00	\$8,000.00
Printing Art Work Publications	\$5,161.00	\$5,468.00	\$6,000.00
Mileage for Staff	\$614.00	\$1,500.00	\$2,000.00
Conferences Conventions Meetings	\$5,298.00	\$5,200.00	\$6,000.00
Agency Dues	\$843.00	\$1,000.00	\$1,000.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors	\$3,494.00	\$4,010.00	\$5,000.00

Liability Insurance			
Misc. Expenses (not otherwise listed)	\$1,310.00	\$1,920.00	\$1,000.00
Total Expenses (Before Depreciation)	\$364,912.00	\$432,685.00	\$498,000.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$1,065,825.00	\$0.00	\$0.00
Depreciation	\$27,021.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Older American's Act	\$60,500.00	24	we would increase our fundraising efforts and look for other funding revenues
EFSP/FEMA	\$10,000.00	16	we would increase our fundraising efforts and look for other funding

			revenues
--	--	--	----------

K. Agency Capacity

Completed by ellen@beloitmealsonwheels.org on 8/11/2023 2:08 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

We have been providing service to the Beloit community for 52 years.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

Beloit Meals On Wheels has been administering CDBG grant awards for the last seven years. We also have 24 years of experience administrating and reporting Older American's Act federal funding.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

We have not experienced any findings or concerns during our monitoring visits or financial audits.

Audit Documents

FINAL_Beloit Meals on Wheels Financial Statements 2021.pdf

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

We have not received any citizen complains or negative media exposure in the last three years.

Citizen Complaints/Negative Media Exposure

FINAL_Beloit Meals on Wheels Financial Statements 2021.pdf

L. Staffing Capacity

Completed by ellen@beloitmealsonwheels.org on 8/11/2023 2:16 PM

Case Id: 30178

Name: Beloit Meals On Wheels, Inc. - 2024

Address: 1534 Shore Drive, Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Executive Director, Ellen Wiegand, will oversee implementation of the program with the help of our outsourced accountant which will aid in required reporting.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Beloit Meals on Wheels financial management department consists of an outsourced accountant that handles our account receivables, payables, and payroll. We also have a volunteer board finance committee that provides financial oversight for the organization. As an agency, we have seven years of CDBG federal grant experience and reporting, and 24 years of Older American's Act federal grant experience and reporting.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

Our accountant will indicate on our financial reports the CDBG award (income and expense) for program service income and expenditures relative to this award.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

We keep track of our beneficiaries' data using our monthly service indicator report which tracks the number of clients served as well as the socio-demographics for all of our clients.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

We verify legal status during our admission process by asking to see their Medicare/Medicaid card, driver's license, or disability verification documents, and then check off the verification on our CDBG admission form proving their legal status.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

We verify our client's address verbally over the phone, or in person during the admission process. We also confirm that their address resides in the City of Beloit by using our large street map located in our office or going to the Census Geocode website.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30167
Name: Family Promise of Greater Beloit - 2024
Address: 1006 Bluff St., Beloit, WI 53511

Completed by staff@familypromisebeloit.org on 6/21/2023 2:22 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Family Promise of Greater Beloit

A.2. Organization Address

1006 Bluff St. Beloit, WI 53511

A.3. Phone Number

(608) 363-0683

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #

S9NEHBGMED6

A.6. Agency CAGE/SAM #

4PY79

A.7. Executive Director/Chairperson

AMANDA OKANE

A.8. Email Address

amanda@familypromisebeloit.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

18

PROJECT INFORMATION

A.11. Project Name

Emergency Shelter

PRIMARY CONTACT #1

A.12. First Name

AMANDA

A.13. Last Name

OKANE

A.14. Email Address

mbgliebe1@gmail.com

A.15. Phone Number

(181) 529-8439

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Merry Beth

A.17. Last Name

Gliebe

A.18. Email

mbgliebe1@gmail.com

A.19. Phone Number

(815) 298-4393

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by staff@familypromisebeloit.org on 6/21/2023 2:27 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

FPGB provides prevention, emergency shelter and stabilization to low income families facing homelessness.

C. Project Type

Completed by staff@familypromisebeloit.org on 6/21/2023 2:31 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. Public Services – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning

C.2. Non Public Services Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition,

- Subsistence Payments (one time or short term emergency payments on behalf of clients.)
- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

FPGB provides rental assistance and security deposits, emergency shelter, and stabilization programming to families facing homelessness.

construction, reconstruction, rehabilitation, or installation of public facilities and improvements

Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services

Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by staff@familypromisebeloit.org on 6/21/2023 2:34 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

FPGB provides case management via our homelessness prevention, emergency shelter, and stabilization program to families facing homelessness.

E. Conflict of Interest

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

Completed by staff@familypromisebeloit.org on 6/21/2023 2:34 PM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by staff@familypromisebeloit.org on 6/21/2023 4:25 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

List of Board of Directors Feb 2023.docx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles of Incorporation and Articles of Amendment.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

FPGB 501c3 Documentation name change.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

FPGB April 13 2023 Minutes (1) CDBG.docx

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to

Printed By: Brian Gile on 8/16/2023

8 of 29

*negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

CDBG 2023 letter.docx

 **Organizational Chart – Include only one copy**

*An organizational chart must be provided that describes the agency's administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

FPGB orgizational Chart 3.2023.docx

 **Audit**

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

FPGB 2020 Financial Review Hagen Report.pdf

G. Funding Priorities

Completed by staff@familypromisebeloit.org on 8/14/2023 5:22 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

Family Promise's comprehensive case management strategies increase the percentage of long-term residents in the

Printed By: Brian Gile on 8/16/2023

10 of 29

Neighborhoods and connect residents to financial and supportive resources by addressing homelessness in 3 ways: prevention/diversion, shelter, and stabilization. Families with short-term financial emergencies receive eviction prevention/diversion services such as landlord mediation and one-time rental assistance to help them remain in their homes. This initiative -- proven by HUD research to be more cost-effective than addressing the problem after families are already homeless -- also avoids the trauma of moving to a shelter and frees space for those in critical situations. The program is a first-step, rapid response offering one-time rental assistance for current rent due within 10 calendar days or for the total amount of one month's past-due rent. All payments are made directly to landlords and families must have exhausted all other resources. To receive assistance, families who have been served an eviction notice must first complete an application. Applicants are then given a background check to eliminate those involved in sex crimes or in the manufacturing of illegal substances while in a residence. Following FPGB application review, staff contacts the applicant family's landlord to determine if financial assistance will actually prevent eviction or if there are underlying problems which funds from our program cannot address. Based on the landlord's response, Family Promise staff develops a unique case management plan for each family.

Families facing immediate homelessness receive safe, supervised shelter, including food, showers, laundry facilities, a kitchen, and in-shelter access to Wi-Fi-networked computers for employment and housing searches. Shelter guests are also provided with gas cards and bus tokens for transportation to educational training and medical, social service, or housing-related appointments. The Beloit School System transports youngsters to their local schools rather than having to enroll in new ones.

In addition, FPGB Increases the involvement of residents in their neighborhoods and promotes meaningful connections with the community, by recruiting and sustaining volunteers who prepare and supply the food for sheltered guest families and provide fellowship and socialization during the evening hours from 5-9 p.m.

Families remain in our new emergency shelter program for an average of sixty days with a maximum of 120 days -- an extension of our previous ninety-day limit due to the severe local housing shortage. During their stay, all families receive transformational case management as they are assisted with developing an individual action plan to regain housing and stability. Action plans may include networking with local landlords and with area service providers who assist families in obtaining healthcare, employment, job skills, transportation, or supported childcare. In addition, plans may incorporate services provided directly by Family Promise such as instruction in financial literacy, budgeting, nutrition, parenting, tenant education, or assistance in obtaining benefits for those who are eligible. In addition, families may also receive financial assistance to pay security deposits or first month's rent if they are starting a new job or have other immediate expenses.

After leaving our Emergency Shelter, families enter our Stabilization program and receive a full year of monthly follow-up contact from our staff, including case management and referrals to other appropriate resources that will assist them in addressing new or unexpected challenges and help prevent their falling back into homelessness.

Family Promise helps to build a stronger community one family at a time. More families with the skills to become self-sufficient increase the number of stake-holders who want to make our city a better place to live, work, and play. Stable neighborhoods promote the civic engagement that supports safe and viable communities, offering their citizens the opportunity to build a future for themselves and for their families.

H. Agency Summary

Completed by staff@familypromisebeloit.org on 8/14/2023 5:25 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Originally incorporated as Hands of Faith on April 26, 2001, Family Promise of Greater Beloit is a 501 C-3, non-stock corporation dedicated to keeping families in crisis together since 2000. Since that time, we have continued to provide a community-based, holistic response to homelessness. An affiliate of the national Family Promise network, we offer families facing homelessness immediate safe shelter, food, counseling, and a path to stable housing, and financial sustainability.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

Family Promise of Greater Beloit provides shelter, food, clothing, and life skills to families facing homelessness, helping them become self-sufficient members of the community. We serve families with at least one child under age 18 with homelessness prevention and emergency housing and services. Families with short-term financial emergencies receive eviction prevention assistance to help them remain in their homes. FPGB provides one-time rental assistance and additional single-incident services such as payment for utility bills, car repairs, or other transportation expenses. Families facing immediate homelessness receive safe shelter, food, clothing, and transformational case management as they develop an action plan to regain housing and stability. They also receive the assistance of community volunteers who make meals, provide companionship, read stories, and offer compassion and support. Families graduating from the shelter program receive 12 months of additional case management support in our stabilization program and they may receive financial assistance to pay security deposits or first month's rent if they are starting a new job or have other immediate expenses.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

The supply of affordable housing in Beloit remains critically low. Even before the Pandemic, the rate of evictions in Beloit rate was 4.34% -- higher than the Wisconsin average of 1.89% and the national average of 2.34%. COVID-19 only intensified this condition. Assistance through the Wisconsin Emergency Rental Assistance program, providing up to 18 months of rental assistance for those who had lost income due to the pandemic, ended in January, 2023. In spite of this program, there were 61 eviction judgements in Beloit in 2022. According to the Wisconsin Department of Administration, that number represents nearly 4% of the total 1,621 evictions in the State. Because affordable housing in Beloit is limited, landlords may require strict limits on rental applicants or charge rental security deposits of double or

Printed By: Brian Gile on 8/16/2023

12 of 29

triple the monthly rent.

Although FPGB has responded to this housing crisis by changing its service delivery model to a fixed-site shelter, tripling our capacity from 3 families to approximately 9, our waiting list still averages 30-40 families who are currently homeless or at imminent risk of becoming homeless.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Family Promise of Greater Beloit has continued to develop and expand in order to meet the needs of the community. Because the lack of low-income housing for Beloit families has become a critical factor in addressing homelessness, Family Promise of Greater Beloit has transitioned from a rotating, congregational program to a new, fixed-site facility serving up to 9 families (at our average of 3 members per family) at one time -- three times our former capacity. In addition, we are serving a substantially-increased number of families with direct emergency rental assistance.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

FPGB is the only family shelter in Beloit (excluding domestic violence). Rather than duplicate services, we collaborate with other agencies that address obstacles to self-sufficiency and with Beloit faith and other community organizations. In addition, we continue to maintain our connection with the local HUD Continuum of Care and the Beloit Area Task Force on Homelessness.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Family Promise helps families facing homelessness develop their own plans for self-sufficiency by collaborating with existing resources. Referrals to organizations that assist with hunger, education, physical and mental health, addiction treatment, physical disabilities, legal issues, parenting, vocational rehabilitation, or job training are often essential to addressing the underlying causes of homelessness.

We regularly collaborate with the following organizations to coordinate and identify gaps in service, share information, conduct needs assessments, maximize resources by reducing duplication of efforts, and advocate for policies addressing homelessness and the lack of affordable housing:

- House of Mercy Homeless Center
- Salvation Army
- Defy Domestic Abuse Beloit
- Community Action Inc.
- * ECHO of Janesville
- * Twin Oaks Shelter
- * YWCA of Janesville
- Rock/Walworth Homeless Intervention Task Force
- Rock County Anti-Human Trafficking Task Force
- Over 25 Beloit Faith Congregations
- Our Lady of the Assumption God's Fund
- * Stateline Mental Health Services
- School Districts of Beloit & Janesville
- Beloit Area Task Force on Homelessness
- Emergency Shelter Diversion Committee of the Wisconsin Balance of State Continuum of Care

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Our outreach to the community will include our Facebook page as well as our agency web page which has been enhanced to include an online application for rental assistance, eliminating the requirement to schedule an in-person appointment. We will also provide brochures and information to area churches, the Beloit Public Library, the School District of Beloit, and other public facilities. In addition, we will also issue press releases to local media and continue our strong collaboration with other social services agencies and faith communities who refer families to our programs.

I. Project Summary

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

Completed by staff@familypromisebeloit.org on 8/14/2023 5:26 PM

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

Demographically, 95% of the population we serve is classified as low-income; 5% have low-moderate income. About 20% of households do not have an employed adult member, 50% have at least one employed adult member, and 30% have another source of income, such as social security, disability, or child support. About 55% of our participants are Black; 40% are Caucasian, 5% identify as "other". Typically, 85% of those we assist are female; 15% are male. The great majority -- about 77% -- are children less than 18 years old -- data supported by the fact that, each year, the School District of Beloit identifies approximately 500 of its 6,500 students as homeless. Of the households we serve, about 85% have only one parent; 15% have two.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	8 families receive rental assistance intake. 6 of 8 families receive direct financial assistance to tenants facing eviction by issuing emergency rental vouchers. 2 of 8 families receive financial assistance for other prevention services. 11 families are enrolled in the shelter program. 11 families are referred to Coordinated Entry and/or other social services agencies. 11 families in shelter are	57	19	\$8,750.00

	<p>provided with weekly case management.</p> <p>9 of 11 families in shelter are provided with direct financial assistance to secure housing such as rental assistance and security deposits.</p> <p>9 families graduate from shelter receive stabilization services: ongoing case management; monthly follow-up; referrals as appropriate.</p>			
Q2 4/1/24-6/30/24	<p>10 families receive rental assistance intake.</p> <p>8 of 10 families receive direct financial assistance to tenants facing eviction by issuing emergency rental vouchers.</p> <p>2 of 10 families receive financial assistance for other prevention services.</p> <p>12 families are enrolled in the shelter program.</p> <p>12 families are referred to Coordinated Entry and/or other social services agencies.</p> <p>12 families in shelter are provided with weekly case management.</p> <p>8 of 12 families in shelter are provided with financial assistance to secure housing such as rental assistance and security deposits.</p> <p>10 of 12 families graduate from shelter and receive stabilization services: ongoing case management; monthly follow-up; referrals as appropriate.</p>	60	20	\$8,750.00

Q3 7/1/24-9/30/24	<p>10 families receive rental assistance intake.</p> <p>8 of 10 families receive direct financial assistance to tenants facing eviction by issuing emergency rental vouchers.</p> <p>2 of 10 families receive financial assistance for other prevention services.</p> <p>12 families are enrolled in the shelter program.</p> <p>12 families are referred to Coordinated Entry and/or other social services agencies.</p> <p>12 families in shelter are provided with weekly case management.</p> <p>8 of 12 families in shelter are provided with financial assistance to secure housing such as rental assistance and security deposits.</p> <p>10 of 12 families graduate from shelter and receive stabilization services: ongoing case management; monthly follow-up; referrals as appropriate.</p>	66	22	\$8,750.00
Q4 10/1/24-12/31/24	<p>Quarter 4: October 1 - December 31, 2024</p> <p>10 families receive rental assistance intake.</p> <p>8 of 10 families receive direct financial assistance to tenants facing eviction by issuing emergency rental vouchers.</p> <p>2 families receive financial assistance for other prevention services.</p> <p>12 families are enrolled in the shelter program.</p> <p>12 families are referred to</p>	67	22	\$8,750.00

	<p>Coordinated Entry and/or other social services agencies.</p> <p>10 of 12 families in shelter are provided with weekly case management.</p> <p>10 of 12 families in shelter are provided with direct financial assistance to secure housing such as rental assistance and security deposits.</p> <p>10 families graduate from shelter and receive stabilization services; ongoing case management; monthly follow-up; referrals as appropriate.</p> <p style="text-align: center;">67 22</p> <p style="text-align: center;">\$8,750</p>			
				\$35,000.00

I.3. How will you measure the success of the program? (2 points)

We use a 'Mission Forecast' tool to set goals and track our data including the number of households served in the shelter, the number of households that left the shelter with housing, and the number of households that received Rental Assistance and were prevented from being evicted. We also track our Stabilization Program, in which graduated families are contacted monthly for at least a year to make certain they do not rebound back into homelessness.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

Family Promise of Greater Beloit provides families facing homelessness with centralized case management by being a conduit to human service agencies which offer housing and workforce development programs, food and emergency assistance, and mental health services. We also take referrals from the School District of Beloit; House of Mercy Homeless Center, the Beloit Area Taskforce on Homelessness; and the Rock/Walworth Homelessness Intervention Taskforce. These resources support families facing immediate eviction as well as those who are in shelter.

In addition to working through collaborations, Family Promise provides hands-on, transformational case management. The Shelter Services Manger works with families to set and achieve goals relating to employment, educational opportunities, housing searches, supported childcare, and mental and physical healthcare. Families also participate in financial literacy and "Keys to Good Tenancy" -- our tenant education program in which families learn to successfully transition from homelessness to a stable home environment. Program graduates receive a certificate of completion for presentation to local landlords who support this initiative

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Printed By: Brian Gile on 8/16/2023

18 of 29

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	8	2	0	0	0	0
31-50% CMI	27	9	9	1	13	4
0-31% CMI	82	29	112	11	237	79

J. Project Budget

Completed by staff@familypromisebeloit.org on 8/14/2023 4:54 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbridem@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Staff Wages/Benefits	\$23,000.00
Direct Program Expenses/ Emergency Rental Assistance	\$12,000.00
Total	\$35,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Amanda Okane	Interim Executive Director/Shelter Services Manager	\$45,760.00	\$1,373
Samantha Lamm	Program Assistant	\$19,500.00	\$0.00
Position to be filled	Permanent Executive Director	\$70,000.00	\$3,473

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)

Community Development Block Grant (CDBG)	\$10,000.00	\$16,390.00	\$35,000.00
Contributions	\$45,191.00	\$34,000.00	\$29,000.00
Foundations & Venture Grants	\$668,840.00	\$362,161.00	\$242,482.00
Special Events	\$37,784.00	\$39,572.00	\$43,572.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$12,077.00	\$5,500.00	\$10,000.00
Other Government Fees & Grants	\$0.00	\$0.00	\$0.00
Blackhawk Region United Way	\$15,504.00	\$15,500.00	\$20,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00

Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$13,952.00	\$0.00	\$0.00
Total Support and Revenue	\$803,348.00	\$473,123.00	\$380,054.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$118,292.00	\$214,888.00	\$231,396.00
Employee Benefits	\$2,497.00	\$3,359.00	\$4,050.00
Payroll Taxes	\$9,987.00	\$19,126.00	\$20,594.00
Professional Fees	\$40,940.00	\$105,560.00	\$8,000.00
Supplies	\$14,721.00	\$8,550.00	\$10,000.00
Telephone	\$5,112.00	\$1,920.00	\$3,060.00
Postage	\$704.00	\$775.00	\$500.00
Occupancy (building grounds utilities)	\$24,250.00	\$24,000.00	\$24,000.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$6,200.00
Printing Art Work Publications	\$80.00	\$3,000.00	\$0.00

Mileage for Staff	\$783.00	\$1,080.00	\$175.00
Conferences Conventions Meetings	\$464.00	\$0.00	\$95.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$87,310.00	\$36,739.00	\$43,200.00
Officers & Directors Liability Insurance	\$978.00	\$978.00	\$1,000.00
Misc. Expenses (not otherwise listed)	\$8,794.00	\$6,914.00	\$9,407.00
Total Expenses (Before Depreciation)	\$314,912.00	\$426,889.00	\$361,677.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$488,436.00	\$46,234.00	\$18,376.00
Depreciation	\$25,551.00	\$56,019.00	\$34,296.00
Payment to National Organization	\$2,250.00	\$2,250.00	\$3,750.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Rock County ARPA	\$180,160.00	1	None
ARPA (homelessness)	\$150,000.00	1	None
ARPA (building/facility improvements)	\$200,000.00	1	None
ESG	\$18,455.00	16	None
EFSP	\$17,882.00	8	None
SSSG	\$10,810.00	8	None
ESG Cares - one-time restricted shelter renovation grant	\$340,000.00	1	None

K. Agency Capacity

Completed by staff@familypromisebeloit.org on 8/14/2023 5:41 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

18 years for CDBG funds; 23 years overall

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

Family Promise had been administering federal/state grant awards for over 18 years:

CDBG - 18 years

ESG - 16 years

EFSP - 8 years

SSSG -16 years

ESG Cares - one-time restricted shelter renovation grant of \$334,000

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No



Audit Documents

Audit 2023 Family Promise Final.pdf

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No



Citizen Complaints/Negative Media Exposure

Audit 2023 Family Promise Final.pdf

Printed By: Brian Gile on 8/16/2023

26 of 29

L. Staffing Capacity

Completed by staff@familypromisebeloit.org on 8/14/2023 5:42 PM

Case Id: 30167

Name: Family Promise of Greater Beloit - 2024

Address: 1006 Bluff St., Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Immediate implementation, reporting, and oversight of this program will be conducted by our Interim Executive Director and Shelter Services Manager, Amanda Okane. At present, we are currently conducting a search for a permanent executive director who will engage in some case management and supervise all aspects of the project during the remainder of the grant period.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Adhering to Family Promise of Greater Beloit's accounting policies, the board treasurer and finance committee oversee the finances of our organization. The finance committee develops budgets, accounts for transactional activity, and reports financial information to the board of directors on a monthly basis. Although we have previously undergone a financial review, we have just completed our first, annual independent audit. This agency has more than 18 years of successfully administering federal grants totaling approximately a million dollars.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

For CDBG payroll costs, employees authorized to perform CDBG activities record their hours on their timesheets. The organization uses Quickbooks for its accounting records. Each employee timesheet that includes CDBG hours will be logged in Quickbooks as CDBG-related payroll expenses and tracked within Quickbooks.

For CDBG reporting, Quickbooks generates a report of payroll costs associated with the CDBG in the current year covering the period of the report. That itemized detail will be attached as support to the CDBG reporting form. Once the form is completed it is sent out and a copy is also kept within the organization's support for the covered year.

For CDBG Rental Assistance Funds, copies of a written request for each rental assistance payment will be provided and will include the name of the tenant, the landlord's name, address of the rental property, date, and amount of requested rental assistance, as well as a copy of the check made out to the landlord.

For CDBG reporting, Quickbooks will generate a report of all expenses associated with CDBG in the current year covering the time of the report. That itemized detail will be attached as support to the CDBG reporting form. Once that form is completed, it is sent out, and is also kept within the organization's support for the covered year.

Printed By: Brian Gile on 8/16/2023

28 of 29

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

Family Promise of Greater Beloit requests that families bring a form of documentation with them as part of intake paperwork. Shelter participants are not required to provide proof of legal residence. For rental assistance participants, Family Promise of Greater Beloit copies and retains documents such as a photo ID, passport, social security card, or another identifier of U.S. legal status. Payments are made directly to landlords. Participant's income data is tracked by Family Promise of Greater Beloit's staff through payroll check stubs and verifiable lease agreements between the families and their landlords. These documents will be copied and stored in locked files. Information will also be documented in the online database that is used by Family Promise of Greater Beloit, Wisconsin HMIS, Clarity.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

This is not applicable to the shelter participants. For rental assistance participants, Family Promise of Greater Beloit will copy and retain a photo ID, passport, social security card, or another identifier of U.S. legal status.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Family Promise of Greater Beloit requests that families bring a form of documentation with them when they do the intake paperwork. This is typically an identification card that will state the last known address. A copy of this document is stored in the family's file. For rental assistance, we will utilize the City of Beloit's and the Rock County Property Tax website to verify that the housing that is being supported is within city limits.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30166
Name: HealthNet of Rock County, Inc. - 2024
Address: 113 S Franklin St, Janesville, WI 53511-3812

Completed by ceo@healthnet-rock.org on 6/20/2023 2:51 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

HealthNet of Rock County, Inc.

A.2. Organization Address

113 S Franklin St Janesville, WI 53511-3812

A.3. Phone Number

(608) 756-4638

A.4. Fax Number

(608) 740-2510

A.5. Unique Entity Identifier (UEI) #

SAWQSKPCAZE9

A.6. Agency CAGE/SAM #

5NDD4

A.7. Executive Director/Chairperson

Ian Hedges

A.8. Email Address

ceo@healthnet-rock.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

10

PROJECT INFORMATION

A.11. Project Name

Expanding Medical, Dental, and Behavioral Health Services to Beloit Residents

PRIMARY CONTACT #1

A.12. First Name

Holly

A.13. Last Name

Bowers

A.14. Email Address

hbowers@healthnet-rock.org

A.15. Phone Number

(608) 756-4638

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Ian

A.17. Last Name

Hedges

A.18. Email

ceo@healthnet-rock.org

A.19. Phone Number

(608) 756-4638

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by ceo@healthnet-rock.org on 6/20/2023 11:04 AM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

HealthNet of Rock County provides medical, dental, and behavioral health services for Rock County residents that are 250% or below of the Federal Poverty Level. However, more than 75% of those who receive services are at or below 150% of the Federal Poverty Level. Income is verified through review of income documentation and tax returns. Those who are eligible to receive services funded by CDBG funding will have their income and CMI level evaluated upon enrollment.

C. Project Type

Completed by ceo@healthnet-rock.org on 6/20/2023 11:05 AM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 28

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

HealthNet will provide medical and dental services to Beloit residents of all ages, including youth and elderly populations. HealthNet will also provide behavioral health services, including mental health and substance use treatment, but only to adults over 18 years of age.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by ceo@healthnet-rock.org on 6/20/2023 2:50 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

Maintaining good health is essential for individuals to lead successful lives, encompassing both physical and mental well-being. Access to primary health care plays a pivotal role in this regard, particularly for low-income families who may encounter difficulties in achieving self-sufficiency without proper support. Moreover, inadequate access to healthcare can result in unemployment, eviction, and even bankruptcy. Therefore, it is crucial to establish avenues for free/low-cost care, including medical, dental, and behavioral health and substance use services, as this not only benefits individuals but also alleviates the strain on local healthcare systems by reducing the burden of uncompensated care. By offering accessible care, low-income families can prioritize acquiring life skills and enhancing their overall quality of life.

E. Conflict of Interest

Completed by ceo@healthnet-rock.org on 6/20/2023 11:25 AM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by ceo@healthnet-rock.org on 6/20/2023 3:32 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

Board Contact Information 2023-24.docx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

HealthNet Articles of Inc as amended.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

IRS confirmation of 501c3 determination 4-2023.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

2023 Beloit CDBG Authorization.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 28

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required*

2023 Beloit CDBG Authorization.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required*

Organizational Chart 6-20-23.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Final Financial Statements - Short.pdf

G. Funding Priorities

Completed by ceo@healthnet-rock.org on 7/26/2023 3:57 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

HealthNet of Rock County's diverse range of healthcare services aligns closely with healthcare and mental health access

funding priorities. In the medical clinic, patients receive comprehensive care through a streamlined process involving nurses, medical assistants, and volunteer doctors/nurse practitioners. Medications are readily available on-site, and for those not covered by the Patient Assistance Program (PAP), HealthNet covers the costs, ensuring patients have access to necessary medications. Patients also receive on-site laboratory draws, specialty referral support, and case management services.

The behavioral health clinic staffs a team of skilled professionals, including therapists trained in various modalities, offering tailored treatment to clients. Weekly or biweekly sessions cater to the severity of their conditions. The clinic's bilingual therapists also bridge an essential gap in serving Spanish-speaking clients who have faced challenges elsewhere. A psychiatric nurse practitioner provides crucial medication management and medication-assisted treatment for psychiatric and substance use disorders. Additionally, the services navigator assists clients in addressing their social needs by connecting them with community resources, such as housing and Medicaid enrollment.

Within the dental clinic, patients receive personalized assessments and treatment plans, with procedures such as cleanings, caries treatments, and extractions performed by dentists and hygienists. The Dental Clinic Director oversees operations and facilitates outreach to patients on BadgerCare, emphasizing the establishment of a "dental home" for Beloit residents. This initiative aims to provide comprehensive dental services while instilling positive, preventative behaviors to promote long-term oral health.

HealthNet's commitment to accessible healthcare and mental health services reflects a proactive approach in meeting funding priorities. By providing essential services, addressing social determinants of health, and fostering preventive measures, HealthNet effectively meets the community's healthcare needs, aligning with funding priorities focused on enhancing access and well-being.

H. Agency Summary

Completed by ctucker@healthnet-rock.org on 8/15/2023 1:36 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

HealthNet of Rock County, Inc is a 501(c)3 free and charitable clinic that provides medical, dental, behavioral health, and vision care to uninsured and underinsured Rock County residents since 1994. During the 29 years of operation, HealthNet has recently located all of the separate clinics into a newer facility to create the ease of healthcare for our patients and clients. HealthNet essentially operates as a safety net clinic and is to cater and function services for those that have difficulty finding providers of healthcare services due to various factors.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

HealthNet will use funding from CDBG Beloit for Project Year 2024 to provide medical, dental, and behavioral health services to uninsured and underinsured residents of Rock County. There are several projects that occur within each department for patients, including specialized medical care for diabetic patients, chiropractic services for patients with chronic pain, dental visits for veterans without insurance, emergency visits for patients with dental pain, medications for uninsured medical, dental, and behavioral health patients, and behavioral health services, including individual and group therapy, substance use disorder treatment, and medication management.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

The need for the proposed program and services by HealthNet of Rock County is deeply rooted in the critical gaps and challenges faced by the underserved population in the Beloit community. This project stands as a response to the pressing need for accessible and quality medical, dental, and behavioral health care services. The existing healthcare landscape presents significant disparities and obstacles that must be addressed.

Rock County's shortage of available primary care providers is strikingly evident through its HPSA (Health Professional Shortage Area) score of 14 for primary care. A recent Community Health Needs Assessment conducted by Mercy Hospital in 2023 has underscored this issue, revealing an alarming patient-to-provider ratio of 2,010 in Rock County, compared to Wisconsin's more favorable ratio of 1,240 for primary care. This disparity highlights the urgency of increasing the number of medical professionals in the region to adequately serve the healthcare needs of the community.

A top priority identified in the assessment is Accessible and Affordable Healthcare, emphasizing the immediate need to address the existing gaps in medical services. The scarcity of primary care providers leaves many residents in Rock

Printed By: Brian Gile on 8/16/2023

12 of 28

County without the essential medical attention and preventive care they require. This deficiency poses potential risks to their overall health and well-being.

The situation is no different when it comes to dental services. HealthNet's clinic operates within an HRSA-designated dental provider shortage area, with a HPSA Score of 15. Approximately 10.1% of Rock County's population lives in poverty, creating significant financial barriers that impede access to dental care for a considerable portion of the population. The 2022-2024 Community Health Needs Assessment conducted by SSM Health further emphasizes the pressing demand for dental services in the region. Shockingly, 95% of the 400 individuals seeking emergency room treatment at SSM Health in Janesville for oral health problems in 2019 lacked adequate insurance coverage. This startling statistic highlights the pivotal role that HealthNet plays as one of the few clinics in the region that accepts BadgerCare. It serves as a lifeline for the 75% of uninsured or underinsured Rock County residents who lack regular access to essential dental care.

Recognizing these unmet dental needs, HealthNet has taken significant strides by doubling their dental clinic services between 2022 and 2023. Moreover, HealthNet has recognized the gap in services for individuals with developmental disabilities, offering dental services tailored to their unique needs. This service gap, which had been long overlooked, is now being actively addressed by HealthNet, showing their commitment to inclusivity and comprehensive care.

Addressing gaps in behavioral health services is another cornerstone of HealthNet's mission. A significant portion of the population lacks proper access to mental health care due to factors such as lack of insurance coverage. The scarcity of mental health providers, with only 166 per 100,000 residents, further compounds the challenge of finding timely and appropriate support. The alarming rates of opioid-related issues and a higher age-adjusted suicide rate emphasize the urgency of expanding behavioral health services in the county.

In essence, HealthNet's proposal to provide medical, dental, and behavioral health services directly addresses these pressing community needs and fills substantial gaps in service provision. The impact of this project will be vital in enhancing the overall health and well-being of the underserved population in Rock County. By ensuring that individuals receive the essential care they deserve, HealthNet aims to create a healthier and more equitable community. The documentation from various health assessments, data on patient-to-provider ratios, and the dire situation faced by uninsured and underinsured individuals provide solid evidence of the urgent need for HealthNet's services in Beloit and Rock County as a whole.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Within the past twelve months, HealthNet of Rock County moved into a new facility, bringing the medical and dental clinics together, as well as adding an entirely new behavioral health clinic. In the behavioral health clinic, HealthNet employs three therapists, a services navigator, and a psychiatric nurse prescriber. Therapists can provide therapy using a variety of modalities, including talk therapy, mindfulness, strengths-focused, and EMDR/Brainspotting. Most clients are seen weekly or biweekly, depending on the severity of their illness or condition. All three therapists are also qualified to treat substance use disorders, and two are bilingual, which has been a crucial component to serving Spanish-speaking clients who have struggled to receive services elsewhere. Clients who are suffering from a substance use disorder or have been identified as potentially benefiting from medication are seen by the psychiatric nurse practitioner. She provides medication management and medication-assisted treatment for psychiatric and substance use disorders. Finally, clients who have identified social needs meet with the services navigator who provides assistance with locating housing, enrolling in Medicaid, and connecting clients with other community resources.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already

provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

HealthNet acknowledges the vital role that Beloit Area Community Health Systems (BACHS) plays within the Beloit and broader Rock County community. As a Federally-Qualified Health Center, BACHS offers essential services akin to those provided by HealthNet of Rock County, encompassing medical, dental, and behavioral health care. While BACHS serves as a cornerstone, the needs of the Beloit community surpass the capacity of a single clinic. This reality has become increasingly apparent to HealthNet as the number of Beloit residents seeking our services continues to rise.

Collaboration between HealthNet and BACHS remains robust to ensure that patient needs are efficiently met. This includes oversight of patients potentially receiving duplicated services, as well as a seamless referral process to BACHS for individuals who may not meet the criteria for services at HealthNet. This partnership underscores our shared commitment to optimizing care for every member of the community, further enhancing the impact of our collective efforts.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

HealthNet's dedication to delivering essential medical, dental, vision, and mental health services to the Rock County community is reflected in its collaborations with various service organizations within the City of Beloit and Rock County. These partnerships have been cultivated to ensure effective service delivery, avoid duplication, and provide comprehensive care to the target population.

Recognizing that a cohesive approach is crucial, HealthNet actively engages with a range of organizations to refer individuals to the appropriate services. For those whose incomes exceed 250% of the Federal Poverty Level or who benefit from Medical or Medicare Assistance, referrals are adeptly directed to Federally Qualified Health Centers like Community Health Systems in Beloit. HealthNet's commitment extends beyond its own services, encompassing programs such as the Women, Infants, and Children (WIC) program, Wisconsin Well Women Program, Rock County Social Services, Everyone Cooperating Helping Others (ECHO), The Salvation Army, Head Start, UW Extension Nutrition Services, the Intoxicated Drivers Program, the Seal-A-Smile program, and the Rock County Public Health Department. These strategic alliances ensure that services are delivered seamlessly without redundancy and that individuals receive comprehensive care tailored to their needs.

Formal agreements have been firmly established between HealthNet and local health systems to expand the range of services offered. This includes discounted specialty services and imaging through collaborations with Mercy Hospital and SSM Health. Notably, Mercy's Family Medicine Residency program enhances HealthNet's medical capabilities by involving second and third-year residents as volunteer physicians.

In the dental realm, HealthNet's partnerships with the Rock County Dental Society and the Wisconsin Dental Association Foundation are instrumental in facilitating volunteer dentist participation and offering complimentary or discounted services in oral surgery and endodontics. The commitment to community outreach is evidenced by HealthNet's monthly mobile clinics hosted at Nutrition and Health Associates/WIC and Head Start assessments.

A significant collaboration with Rock Valley Community Programs extends free primary care, dental care, and pharmaceuticals to their clients, highlighting HealthNet's dedication to comprehensive care. For unaccompanied youth, HealthNet collaborates with the Homeless Liaisons of the School District of Janesville and Project 16:49 to ensure access to essential therapy services through HealthNet's behavioral health clinic. This proactive approach underscores HealthNet's commitment to the well-being of all members of the community, regardless of their circumstances.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

HealthNet's approach to outreach and client access is multi-faceted and designed to ensure that the proposed healthcare and mental health services effectively reach the targeted population, especially those who may face barriers in readily accessing technology or healthcare resources.

To build awareness and connect with the community, HealthNet maintains strong partnerships with various organizations, including school systems, churches, clubs, non-profit entities, hospitals, clinics, the Job Center, and local businesses. These relationships serve as conduits for disseminating information about HealthNet's services and availability. HealthNet has also secured a listing in the 2-1-1 phone directory, a widely used resource for community services.

Recognizing that some clients may lack easy access to technology, HealthNet employs a comprehensive approach to ensure inclusivity. Outreach efforts extend to physical locations frequented by the target population, fostering face-to-face interactions and sharing information about available services. This approach includes utilizing existing partnerships with Rock County Jail, Rock County Drug Court, Rock County Human Services, Rock County Public Health Department, and other government agencies. By collaborating with these institutions, HealthNet ensures that individuals with specific needs, who might otherwise have limited access to healthcare, receive essential services.

I. Project Summary

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

Completed by ctucker@healthnet-rock.org on 8/15/2023 1:46 PM

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

HealthNet patients and clients are low-income, uninsured, and underinsured Rock County residents. However, more than 75% of those who receive services are at or below 150% of the Federal Poverty Level. Many of our patients are employed, but do not receive healthcare benefits. Patients seen from Beloit in 2022 demographically identified as the following: 53% identified as White, 36% as Hispanic/Latino, 5% as Black/African American, 5% as two or more races, and 1% as Asian. Approximately, 55 percent of our patients from Beloit are female, while 45 percent are male.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	HealthNet will provide medical services, behavioral health services or dental services to uninsured or underinsured Beloit residents.	0	0	\$0.00
Q2 4/1/24-6/30/24	HealthNet will provide medical services, behavioral health services or dental services to uninsured or underinsured Beloit residents.	0	0	\$0.00
Q3 7/1/24-9/30/24	HealthNet will provide medical services, behavioral health services or dental services to uninsured or underinsured Beloit residents.	45	0	\$12,500.00
Q4 10/1/24-12/31/24	HealthNet will provide medical services,	45	0	\$12,500.00

	behavioral health services or dental services to uninsured or underinsured Beloit residents.			
				\$25,000.00

I.3. How will you measure the success of the program? (2 points)

The success of the program will be measured through well-defined outcomes and indicators that closely align with the project's goals and objectives. HealthNet has a lengthy history monitoring its medical clinic patients' health outcomes, so for this project year, the organization will prioritize monitoring its newest clinic's successes with patient care. Two key outcomes will serve as robust metrics to gauge the impact of the program on patient care and well-being.

Outcome 1 focuses on the completion of dental treatment plans established by patients' dentists. The targeted achievement is that 70% (35 out of 50) of total persons served will successfully complete their dental treatment plans each year. This outcome encapsulates patients' commitment to their treatment plans, adherence to follow-up appointments, and the establishment of a consistent dental care routine. To achieve this outcome, two indicators must be met for each person or family/household: patients attending follow-up appointments to continue dental treatment and dentists documenting the completion of treatment plans in patients' charts using dental code D7004. The basis for selecting this outcome is rooted in its ability to reflect patients' perception of care and the project's overall goals. The dental clinic's Electronic Health Record (EHR), OpenDental, will be utilized to measure this outcome, tracking the ratio of started treatment plans to completed ones, and evaluating the ratio within CDBG-funded recipients.

Outcome 2 centers on the improvement of PHQ-9 scores from intake to discharge within the Behavioral Health clinic. The targeted achievement is that 53% (8 out of 15) of total persons served will exhibit an improvement in their PHQ-9 scores each year. This outcome reflects the progress made in behavioral health treatment, with indicators that include clients attending follow-up appointments, adhering to therapeutic and/or medication treatment plans, and receiving services for a minimum of three months. All three indicators must be met for each person or family/household to achieve the outcome. The selection of this outcome is justified by the challenge of tracking improvement in behavioral health treatment, and the PHQ-9 questionnaire provides a tangible measure of stabilization and progress. Measurement for this outcome will be conducted using client responses to the PHQ-9 questionnaire, administered at least every 90 days. These scores will be tracked within the behavioral health clinic's EHR, Theranest, and reviewed for improvement during the reporting cycle.

By utilizing these specific outcomes and indicators, the program will accurately assess its impact on patient care, treatment adherence, and overall well-being within the dental and behavioral health domains. This systematic approach to measurement ensures that the program's achievements are tracked effectively and align with its overarching objectives.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

HealthNet demonstrates its commitment to comprehensive case management by maintaining a dedicated services navigator and case manager, integral to facilitating access to essential resources and specialized care for clients. The services navigator, who works within the behavioral health clinic, guides clients toward vital resources like housing, Medicaid enrollment, and community support, while the medical clinic's case manager assists patients with accessing specialized care, Medicaid enrollment, and engagement with relevant social services.

To enhance case management capabilities, HealthNet has proactively invested in Community Health Worker training for its case management team. This training equips staff with essential skills to offer effective and holistic support to clients. This commitment extends to new staff members joining the team in the 2024 cohort.

Ongoing case management for clients served by the proposed program will involve a comprehensive approach. The services navigator and case manager will continue to identify and address clients' needs, maintaining regular follow-ups and communication to track progress and emerging needs. This includes staying updated on available community resources, services, and programs, ensuring accurate guidance to clients seeking assistance. The case management team will receive regular training and professional development opportunities to remain well-informed about the latest resources and best practices.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	7	0	0	0	15	0
31-50% CMI	2	0	0	0	25	0
0-31% CMI	17	0	0	0	50	0

J. Project Budget

Completed by ceo@healthnet-rock.org on 8/15/2023 2:08 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Program Expenses	\$25,000.00
Total	\$25,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
------	-------	---------------------	----------------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
See attached fee schedule	\$25,000.00
Total	\$25,000.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$54,100.00	\$32,890.00	\$75,000.00
Contributions	\$608,576.23	\$339,227.51	\$445,000.00
Foundations & Venture Grants	\$449,933.19	\$485,250.00	\$490,000.00
Special Events	\$247,640.99	\$229,150.00	\$255,000.00
Legacies & Bequests	\$0.00	\$0.00	\$0.00

(unrestricted)			
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$1,886,237.24	\$771,643.00	\$785,000.00
Blackhawk Region United Way	\$73,867.00	\$112,861.50	\$112,861.50
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$521,932.18	\$1,240,224.85	\$1,100,000.00
Sales-Materials	\$7,153.39	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$820.90	\$200.00	\$300.00
Misc. Revenue (not otherwise listed)	\$1,934.75	\$1,000.00	\$1,000.00
Total Support	\$3,852,195.87	\$3,212,446.86	\$3,264,161.50

and Revenue			
-------------	--	--	--

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$1,833,255.69	\$2,223,887.52	\$2,112,693.15
Employee Benefits	\$120,914.22	\$146,678.73	\$139,344.80
Payroll Taxes	\$134,457.13	\$163,107.38	\$154,952.01
Professional Fees	\$62,275.99	\$24,750.00	\$25,000.00
Supplies	\$355,967.70	\$381,120.93	\$380,000.00
Telephone	\$10,841.32	\$11,000.00	\$11,000.00
Postage	\$1,297.11	\$2,250.00	\$2,250.00
Occupancy (building grounds utilities)	\$321,725.04	\$76,757.00	\$80,000.00
Equipment Rental & Maintenance	\$18,950.19	\$25,000.00	\$25,000.00
Printing Art Work Publications	\$17,856.66	\$15,000.00	\$15,000.00
Mileage for Staff	\$3,500.00	\$6,800.00	\$7,000.00
Conferences Conventions Meetings	\$28,254.60	\$5,000.00	\$5,000.00

Agency Dues	\$6,041.50	\$5,000.00	\$5,000.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$6,135.95	\$5,200.00	\$5,200.00
Misc. Expenses (not otherwise listed)	\$617,040.56	\$281,709.50	\$288,000.00
Total Expenses (Before Depreciation)	\$3,538,513.66	\$3,373,261.06	\$3,255,439.96

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$313,682.21	(\$160,814.20)	\$7,721.54
Depreciation	\$165,644.91	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years	Findings resulting in the loss of the
-----------------------	--------	------------	---------------------------------------

		Received	funding?
CDBG Janesville	\$44,100.00	25	No

K. Agency Capacity

Completed by ceo@healthnet-rock.org on 8/15/2023 2:10 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

HealthNet has provided services to the Beloit community since 1994 (29 years).

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

HealthNet has a strong and proven track record of successfully securing and effectively utilizing state and local grants. For more than a decade, HealthNet has been a proud recipient of CDBG funds from both Janesville and Beloit, demonstrating the organization's consistent commitment to community development. Moreover, HealthNet has diligently obtained grants from the State of Wisconsin, enabling the provision of essential medical and dental services to the most underserved populations in Rock County. A notable highlight includes HealthNet's attainment of federal support from HRSA in 2022. This critical funding greatly contributed to the realization of HealthNet's Capital Campaign, facilitating the acquisition, revitalization, and relocation to the new facility situated at 113 S Franklin St in Janesville.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

HealthNet has not had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years.

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

HealthNet has not received any citizen complaints or negative media exposure in the past three years.

Citizen Complaints/Negative Media Exposure

***No files uploaded*

Printed By: Brian Gile on 8/16/2023

25 of 28

L. Staffing Capacity

Completed by ceo@healthnet-rock.org on 8/15/2023 2:16 PM

Case Id: 30166

Name: HealthNet of Rock County, Inc. - 2024

Address: 113 S Franklin St, Janesville, WI 53511-3812

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Cori Tucker, Interim Co-CEO, will be responsible for the oversight and implementation of the program. She is also responsible for the direct oversight of services within the dental department. Keisha Owens, Medical Clinic Director, is responsible for the direct oversight of services within the medical department. Kristin Austin, Interim Co-CEO, is responsible for the direct oversight of services within the behavioral health department. Holly Bowers will be responsible for providing required reporting.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

HealthNet of Rock County's financial management team includes the CEO, Billing Manager, and Operations Director. Additionally, HealthNet's Board Treasurer conducts monthly visits to reconcile expenditures, aligning them with grant sources under the guidance of the CEO. The Operations Director uses a formulaic cost approach similar to a local healthcare provider's fee-for-service schedule to manage CDBG funds accurately. The Billing Manager efficiently processes bills and invoices, ensuring prompt reimbursement from funders upon program completion. This collaborative effort guarantees effective financial oversight and responsible allocation of resources.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

In compliance with federal financial requirements, HealthNet will meticulously manage Community Development Block Grant (CDBG) funds. Separate tracking of CDBG Beloit funds will be maintained within the agency's chart of accounts. A dedicated line item for CDBG funds will also be included in the list of receivables.

Financial reporting will be segregated to distinctly present CDBG fund inflows, outflows, and balances. Detailed documentation of all CDBG-related transactions will be upheld and subjected to regular internal audits. Internal controls, including segregation of duties and multi-level approval processes, will be enforced to ensure proper fund management.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

Demographic and financial information is gathered at each person's enrollment. Every patient is required to re-enroll annually to continue receiving services. Here, their demographic information is reverified and their eligibility (income, residency, insurance status) is reverified as well. This information is attested to by each patient at enrollment and is

Printed By: Brian Gile on 8/16/2023

27 of 28

entered by a staff member into the clinic's corresponding electronic medical record.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

The verification and documentation of U.S. legal status for beneficiaries is meticulously carried out by HealthNet through a comprehensive process. When individuals in the community seek services from HealthNet, staff members handle incoming calls and evaluate potential eligibility. To qualify, beneficiaries must be Rock County residents with incomes at or below 250% of the Federal Poverty Level.

Initial eligibility screening is conducted with each patient, during which necessary documentation is assessed. For all patients, an enrollment form is mandatory, followed by an interview conducted by a staff member to confirm eligibility. To establish residency, beneficiaries must provide proof of identity, residency, and income. This may include employment stubs, unemployment stubs, food stamp or interim assistance paperwork, disability information, or last year's tax return. These documents serve to confirm Beloit residency and are digitally stored within HealthNet's electronic medical record systems, Athena, Open Dental, and Theranest. In order to track legal U.S. residency, HealthNet specifically notes the patient's legal status in their electronic file. This determination is based on the presence of a social security number, which is crucial for ascertaining eligibility for services associated with CDBG funds.

For beneficiaries with BadgerCare, HealthNet's verification process is facilitated through the ForwardHealth portal, the administrator of the state's Medicaid program. Accessible during each appointment, HealthNet is able to easily determine whether patients are legal U.S. residents as ForwardHealth patients are all legal U.S. residents, unless they are pregnant.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

HealthNet of Rock County will use Geocoding (Geographic Tracker) through the Census on all eligible Beloit patients. This will be done at the end of every reporting period.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30187
Name: Messiah Lutheran Church Food Pantry - 2024
Address: 1531 Townline Ave., Beloit, WI 53511

Completed by gileb@beloitwi.gov on 7/31/2023 8:52 AM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Messiah Lutheran Church

A.2. Organization Address

1531 Townline Ave. Beloit, WI 53511

A.3. Phone Number

(608) 365-3794

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #

Not Yet

A.6. Agency CAGE/SAM #

A.7. Executive Director/Chairperson

Carol Wilkins

A.8. Email Address

twonjoy1024@aol.com

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

No

PROJECT INFORMATION

A.11. Project Name

Messiah Lutheran Church Food Pantry

PRIMARY CONTACT #1

A.12. First Name

Carol

A.13. Last Name

Wilkins

A.14. Email Address

twonjoy1024@aol.com

A.15. Phone Number

(608) 879-4069

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Linda

A.17. Last Name

Stocker

A.18. Email

ljstoke@charter.net

A.19. Phone Number

B. National Objectives

Completed by gileb@beloitwi.gov on 7/3/2023 10:20 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

Text in physical (paper) application

NPSHared>CDBG>CDBG 2024>Applications>Messiah Lutheran Church>Pre-Application

*Brian Gile 7/3/23

C. Project Type

Completed by gileb@beloitwi.gov on 7/3/2023 10:00 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 22

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Application is a non-profit food pantry in the city of Beloit

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

N/A

D. Consolidated Plan Goal

Completed by gileb@beloitwi.gov on 7/3/2023 10:04 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

The food pantry supplies necessary items to those in need, including the homeless in Beloit, WI.

E. Conflict of Interest

Completed by gileb@beloitwi.gov on 7/3/2023 10:04 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by gileb@beloitwi.gov on 7/3/2023 10:19 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

Messiah L C BOD.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Messiah L C IRS Ruling.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

Messiah L C Tax Exempt.pdf

Authorization to Request Funds – Include only one copy

*Documentation must be submitted of the governing body's authorization to submit the funding request. Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Messiah L C Board Approval to Apply.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 22

the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required

Messiah L C BOD.pdf

Organizational Chart – Include only one copy

An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required

Messiah L C Staff List.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

*****No files uploaded***

G. Funding Priorities

Completed by gileb@beloitwi.gov on 8/2/2023 10:38 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

Our program, Messiah Lutheran Pantry, will address the funding by providing nourishing food and nonperishable items

to the Greater Beloit Community. This will assist families with food insecurity issues. Pamphlets are also available to all clients to assist them with other needs.

H. Agency Summary

Completed by gileb@beloitwi.gov on 8/2/2023 10:39 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Messiah Food Pantry started on July 19, 2021, so we have been in operation for almost two years. We are a nonprofit food pantry. We are self-supporting, and rely on donations for our operation. The purpose of our agency is to assist families in the Greater Beloit Community with perishable and nonperishable food items.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

We will use the funding to purchase perishable and nonperishable food items, hygiene items, and various paper products. A goal of ours is to purchase an additional refrigerator/freezer because of the increased number of clients.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

According to city records, 17.7% of the population of Beloit is living in poverty. 56.9% of the School District of Beloit students are economically disadvantaged.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Our program has greatly expanded in the past two years.

We started with 17 families in 2021. Currently we have 436 registered families. In the past 12 months we have provided food for 224 families.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

We are the only food pantry located on the Westside of Beloit. We collaborate with Our Saviors Lutheran Church. After their mobile pantry has provided food, we pick up any leftover items for distribution at our pantry. We coordinate with other pantries, so as to not duplicate day and hours of operation.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

We work with Second Harvest Food Bank. Woodman's in Beloit provide us with paper and plastic bags used in our operation. We also receive private donations from the community.

Printed By: Brian Gile on 8/16/2023

12 of 22

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

We have signs, and pamphlets available to the community. We are on the Beloit and Madison Registration for local pantries. Printed calendars are available with our open pantry dates. We also have a list of agencies that provide our clients with services available to assist them with other needs.

I. Project Summary

Completed by gileb@beloitwi.gov on 8/2/2023 10:41 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

The population served by our food pantry includes infants through seniors. All ages, genders, and ethnic groups can be recipients. We welcome everyone.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Food distribution	320	80	\$3,125.00
Q2 4/1/24-6/30/24		0	0	\$0.00
Q3 7/1/24-9/30/24		0	0	\$0.00
Q4 10/1/24-12/31/24		0	0	\$0.00
				\$3,125.00

I.3. How will you measure the success of the program? (2 points)

Success will be measured by our increase in clients. We are hoping our pantry client number increases by 10%.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

We have paper and digital registration records on all of our clients. The registration records also assist us in meeting any dietary or special needs they have.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served

81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	0	0	0	0	0
31-50% CMI	0	0	0	0	0	0
0-31% CMI	848	212	896	224	1,260	315

J. Project Budget

Completed by gileb@beloitwi.gov on 8/2/2023 10:45 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Program Expenses	\$12,500.00
Total	\$12,500.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
------	-------	---------------------	----------------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$0.00	\$0.00	\$12,500.00
Contributions	\$0.00	\$0.00	\$0.00
Foundations & Venture Grants	\$0.00	\$0.00	\$0.00
Special Events	\$0.00	\$0.00	\$0.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00

Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$0.00	\$0.00	\$0.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$0.00	\$0.00	\$12,500.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$0.00	\$0.00	\$0.00

Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$0.00	\$0.00	\$0.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$0.00	\$0.00	\$10,400.00
Telephone	\$0.00	\$0.00	\$0.00
Postage	\$0.00	\$0.00	\$0.00
Occupancy (building grounds utilities)	\$0.00	\$0.00	\$0.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$0.00	\$0.00	\$0.00
Mileage for Staff	\$0.00	\$0.00	\$0.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00
Misc. Expenses (not otherwise listed)	\$0.00	\$0.00	\$2,100.00
Total Expenses (Before Depreciation)	\$0.00	\$0.00	\$12,500.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
-----------------------	--------	---------------------	--

K. Agency Capacity

Completed by gileb@beloitwi.gov on 8/2/2023 10:46 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

We have provided food pantry services to the Beloit Community for 2 years.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

We have no experience, but we will be upgrading our registration forms to be in compliance with CDBG program requirements. We know we will need to change our documents to include income level and to calculate the number of city residents served.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by gileb@beloitwi.gov on 8/2/2023 10:47 AM

Case Id: 30187

Name: Messiah Lutheran Church Food Pantry - 2024

Address: 1531 Townline Ave., Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Carol Wilkins, director, will oversee implementation of the program and required reporting. Linda Stocker, assistant director, Carol Wilkins, and Terry Zimmerman will oversee finances of the program.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Our financial management department is headed by Terry Zimmerman. We have no experience in administering federal funds.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

We intend to follow all CDBG guidelines. We will keep all food, nonperishable, refrigeration unit receipts and invoices that are purchased with CDBG grant funds.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

This information will be included on the future registration form. Each member of the household is listed on our current form.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

We will continue to use their driver's license or proof of residency through a current bill.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

We will use Geocoder to assist us in determining city or township residency.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

No

A. Applicant and Project Information Summary

Case Id: 30172
Name: Project 16:49 Homeless Youth Services - 2024
Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

Completed by tdegarmo@project1649.org on 6/22/2023 10:09 AM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Project 1649, Inc

A.2. Organization Address

2911 CARROUSEL LN JANESVILLE, WI 53545

A.3. Phone Number

(608) 314-5501

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #

JVN3UQB86ED5

A.6. Agency CAGE/SAM #

70UU2

A.7. Executive Director/Chairperson

Tammy DeGarmo

A.8. Email Address

tdegarmo@project1649.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

9

PROJECT INFORMATION

A.11. Project Name

Homeless Youth Services

PRIMARY CONTACT #1

A.12. First Name

Tammy

A.13. Last Name

DeGarmo

A.14. Email Address

tdegarmo@project1649.org

A.15. Phone Number

(608) 314-5501

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

A.17. Last Name

A.18. Email

A.19. Phone Number

B. National Objectives

Completed by tdegarmo@project1649.org on 6/28/2023 3:36 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele):
abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

Project 16:49 will provide direct services for homeless youth - ages 14 to 21 and primarily high school students - in Beloit, including:

- basic needs assistance
- comprehensive, age-appropriate case management
- life skills education
- Robin House Transitional Living Program (TLP) -- supervised shared housing
- Youth Rapid Rehousing + Case Management

The youth we serve are either extremely low or very low income at intake, and are experiencing homelessness. We assist youth with enrolling in state and local benefit programs (food share, health care, housing assistance, etc), and connect them with other community resources, when available, to prevent duplication of resources. This includes physical and mental health care, education and employment programs, and other service agencies, based on their needs. Our case managers complete strength and needs assessments to assist with goal setting and progress

Printed By: Brian Gile on 8/16/2023

3 of 32

monitoring. Youth also are assisted with academic and vocational planning, job searches and employment skills, and identifying / obtaining affordable housing options.

As part of 16:49's case management, youth learn and develop valuable life skills to support them in transitioning to and sustaining independent living. This includes:

- * budgeting and financial literacy
- * nutrition and meal planning
- * tenant rights & responsibilities
- * personal and household hygiene
- * setting appropriate boundaries and fostering healthy relationships
- * building & strengthening their support network

Youth are supported in learning how to manage their physical and mental health and well-being: learning positive coping skills and lifestyle choices, developing communication skills, and addressing anger management. Case managers ensure youth know how to access necessary community services and how to advocate for themselves.

Youth set and work towards/achieve personal goals with the support and assistance of our case managers and staff. TLP residents create an individual action plan that maps out their individual goals and the steps needed to accomplish them. Action plans focus on 5 key areas related to self-sufficiency: education, housing, employment / income / savings, whole health, and social-emotional well-being. Action plans are reviewed at case management 1-on-1's to ensure youth are staying on track with their goals and reinforce accountability.

C. Project Type

Completed by tdegarmo@project1649.org on 6/22/2023 11:29 AM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

5 of 32

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Project 16:49 provides basic needs assistance and age-appropriate case management for homeless youth, ages 14 to 24; and provides transitional housing and rapid rehousing options for older youth -- ages 17 to 21 in our TLP, and 18 to 24 in our youth rapid rehousing program. Youth receive individualized age-appropriate case management, basic needs support, and service referrals. Staff ensures youth have access to the services, support and guidance they need to complete their high school education (if needed), increase their self-sufficiency, and prepare for / transition to sustainable independent living.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by tdegarmo@project1649.org on 6/28/2023 4:53 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

Project 16:49's mission is to empower our unaccompanied homeless youth to take action to achieve their goals. We provide youth-centered homeless services for Beloit youth, ages 14 to 24 -- with the vast majority being under 20 and high school students. Services focus on addressing youth's safety and basic needs, increasing their self-sufficiency, and helping them prepare for and transition to independent living. This includes:

- Basic needs assistance and age-appropriate comprehensive case management are available for any Beloit youth experiencing homelessness.
- Robin House TLP (transitional living program), which provides up to 18 months of supervised shared housing + personalized goal planning & case management for 8 residents (female), ages 17 to 21.
- Youth Rapid Rehousing Program (in partnership with ECHO), which provides up to 24 months of rent assistance + case management for youth ages 18 to 24.

Our case managers work with youth to ensure they are connected to other appropriate community resources. Youth who do not have their birth certificate, social security card and/or an ID are immediately assisted with obtaining these identification documents. Youth who are eligible are enrolled in Foodshare benefits, state health insurance, and housing assistance programs. Youth work with the case manager to set up necessary health, mental health and dental appointments. Transportation assistance or planning is provided. Staff also assist youth who have income with opening a bank account and understanding how it works. To prevent duplication of services, Project 16:49 refers youth to other community resources, as needed, to address individual needs and goals of each youth. Case managers work hands-on with youth to navigate systems and advocate on behalf of the youth.

A core component of our case management is life skills education. Youth have the opportunity to learn and practice key life skills, such as: budgeting & financial literacy, academic and vocational exploration and planning, employment and interviewing skills, tenant rights & responsibilities, nutrition and meal planning, managing health care, personal and

Printed By: Brian Gile on 8/16/2023

7 of 32

household safety and hygiene, communication, healthy relationships, coping skills, and self care. In addition to 1-on-1 mentoring, TLP residents also participate in weekly life skills groups.

TLP and Rapid Rehousing residents create an individual action plan based on their own personal goals in 5 key areas related to self-sufficiency: education, housing, employment/income, health, and overall well-being. TLP residents meet at least weekly, and Rapid Rehousing residents at least monthly (with multiple phone check-in's between), with their case manager to ensure progress is being made on goals, and necessary life skills are being addressed. Youth who participate in case management outside of our housing programs meet with a case manager on a mutually-agreed upon schedule based on their situation and needs.

Youth who have not graduated high school are strongly encouraged to attend school or a GED program and complete their basic education. This is a program expectation for TLP residents.

Youth are strongly encouraged to work and are provided assistance / support with job search and employment retention. This is a program expectation for TLP residents. TLP residents also are expected to save at least 30% of their income in an independence account that is returned to them when the exit. This allows them to have funds set aside for when they move out, and teaches budgeting skills. Rapid Rehousing residents are required to put 30% of their income towards their rent - they pay this directly to their landlord.

Project 16:49 provides TLP residents with transportation assistance to/from work, interviews, medical and counseling appointments, other community agencies, and the grocery store. Rapid rehousing and community youth develop transportation plans with their case manager, and are provided some limited transportation assistance -- bus tokens, gas cards, and occasional staff-provided rides, particularly when staff is accompanying youth to an appointment.

E. Conflict of Interest

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

Completed by tdegarmo@project1649.org on 6/22/2023 11:32 AM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by tdegarmo@project1649.org on 6/29/2023 8:46 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation



List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

2023 Board List.docx (1).pdf



Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles of Inc.pdf



Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

501c3 verification letter.pdf



Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

230206 Minutes - CDBG highlighted.pdf



Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

10 of 32

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

2024 Beloit CDBG attachment - designation of authorized official.docx.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

2023 Organizational Chart.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

2021 Audit Financial Statements.pdf

G. Funding Priorities

Completed by tdegarmo@project1649.org on 8/14/2023 2:12 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

Project 16:49's mission is to empower our community's unaccompanied homeless youth to take action to achieve their

goals. In addition to basic needs assistance, Project 16:49 offers youth who are interested / willing the opportunity to participate in age-appropriate comprehensive case management, which may include any or all of the following activities related to the Public Service Programs identified priorities: identification of housing options, including Project 16:49's transitional living program homes; life skills education; financial literacy & budgeting, healthcare access, transportation assistance / planning; mental health support.

Housing assistance:

Our Robin House TLP, located in Beloit, provides stable housing for unaccompanied homeless female youth, ages 17-21, for up to 18 months. Residents are provided individualized comprehensive case management to facilitate a positive transition to independent living. All residents create an individual action plan based on their own personal goals in 5 key areas related to self-sufficiency: education, housing, employment/income, health, and social and emotional well-being. Residents meet weekly with the case manager to ensure progress is being made on goals, the resident agreement is being upheld, and necessary life skills are being addressed based on the youth's individual needs. Non-TLP youth work with their case manager to identify safe, stable housing options. This may include identifying a potential host home, or for youth who are old enough, finding their own apartment. The case manager helps youth reach out to those identified as potential housing providers, offering a variety of support, as needed; and/or assists youth in enrolling in housing assistance programs, and identifying and applying for housing units.

Life skills education / financial literacy:

While residing in the TLP, youth have the opportunity to learn and practice key life skills through weekly group meetings and individual mentoring. Life skills education topics/areas include: financial literacy and budgeting, academic and vocational exploration and planning, employment and interviewing skills, tenant rights and responsibilities, nutrition and meal planning, managing physical and mental health care, personal and household safety and hygiene, communication, healthy relationships, coping skills, and self-care. Case managers work individually with non-TLP youth to address core life skills needs. Budgeting / finances are part of regular case management 1-on-1 discussions. Youth are expected to work or be actively looking for employment; and receive assistance with applications, interview preparation, and transportation or transportation planning. TLP residents are expected to save at least 30% of their income in an independence account that is returned to them when they exit. This teaches budgeting skills, and allows them to have funds set aside for security deposits, vehicles, or other needs. Non-TLP youth are encouraged to have a savings account and include it in their budget plan. Case managers work to help youth establish a budget, save money, plan for larger or unexpected expenses - and help them learn to hold themselves accountable for their money management and spending choices. Staff also assists youth who have income with opening a bank account, if needed.

Basic needs / healthcare access / mental health support:

Case managers work with all youth to ensure they are connected to appropriate community resources. Youth who do not have possession of their birth certificate, social security card and/or an ID are immediately assisted with obtaining their identification documents. Those who are eligible, are enrolled in Foodshare benefits, state health insurance, and housing assistance programs. Youth work with the case manager to set up necessary health, mental health, dental and other appointments. Case managers provide referrals, arrange or provide transportation to health appointments, accompany youth to their appointments (if youth wants), and advocate on behalf of youth (when needed). Case management meetings regularly include discussion of health and mental health status and needs. Case managers help youth identify and learn positive coping skills, and establish safety plans (when needed).

Transportation:

Project 16:49 provides TLP residents with transportation assistance to/from work, interviews, medical and counseling appointments, other community agencies, and the grocery store. Assistance includes staff-provided rides, bus tokens/passes, and gas cards. Non-TLP residents also receive assistance with bus tokens/passes and gas cards, and are

provided rides on a more limited basis. The case manager assists both TLP and non-TLP youth with transportation planning. This often includes teaching youth how to use public transportation (and coordinating appointments / work to fit with the schedule), identifying others who can provide reliable rides, and assisting youth with obtaining their drivers license and/or saving money for purchasing & maintaining a vehicle.

Education:

Youth who have not received a high school diploma or GED are encouraged* to complete their basic education, and are supported in doing so. (* Note: High school attendance / completion is an expectation for TLP residents.)

H. Agency Summary

Completed by tdegarmo@project1649.org on 8/14/2023 4:25 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Project 16:49 was incorporated in May, 2012; and began officially serving unaccompanied homeless youth with the opening of Robin House in February, 2014. Project 16:49 is a 501(c)(3) non-profit corporation. The organization's mission is to empower unaccompanied homeless youth to take action to achieve their goals. We provide basic needs assistance, referrals, and age-appropriate case management for youth ages 14 to 21; in addition, we operate two transitional living homes for youth ages 17 to 21. Our organization was established to help fill a gap in local homeless services.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

Project 16:49 is requesting funds to provide direct services for unhoused youth, ages 14 to 21, in Beloit. These youth cannot live or live safely with a parent or guardian, and do not have an adequate, fixed nighttime residence. The majority of these youth are high school students, others have dropped out or recently graduated and have no place to go.

Project 16:49 will provide age-appropriate, comprehensive case management, and offer youth life-changing support and opportunities that allow youth to:

- * complete their basic education, and pursue further education (if they chose)
- * set, work towards and achieve goals
- * increase their self-sufficiency, acquire critical life skills, and prepare for independent living
- * address the trauma they have experienced, heal and grow

All efforts are personalized based on the youth's own identified goals and the results of their strengths and needs assessment. The case manager works with youth to create an individual action plan, setting goals in key areas related to self-sufficiency: education, housing, employment/income, health, and social and emotional well-being. TLP residents participate in weekly life skills groups, attend weekly 1-on-1 case management meetings, and have opportunities to develop and practice life skills with staff. Non-residents also meet regularly with the case manager, and receive individual life skills education.

All of these things work together to expand youth's future job options and earning potential; as well as, increase their ability to become and remain self-sufficient.

Funds will be used to cover direct expenses related to serving unhoused youth in Beloit, such as: purchase of

Printed By: Brian Gile on 8/16/2023

15 of 32

identification, emergency food assistance, transportation assistance, health care related items, school & work access costs, household supplies.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

The Beloit School District identified 87 unaccompanied homeless teens in the 2022-23 academic year; and our program assists between 125-150 Beloit youth each year.

Our organization was established in response to adult homeless service providers recognizing the need for youth-centered services in our community. Adult services typically are not structured (or intended) to serve youth, who have different needs and require a different level of support in order to facilitate positive outcomes.

Without support and stability, these youth are at increased risk of dropping out of school, suffering physical and/or sexual assault, exploitation and trafficking; as well as, contracting STI/STDs, unplanned pregnancy, poor nutrition and health, severe anxiety and/or depression, and engaging in self-harm.

With successful intervention, the youth Project 16:49 serves risk factors are reduced, and they are able to graduate high school (94%), improve their health and well-being (98%+), obtain or increase employment (85%), and increase their self-sufficiency (95%). In 2022, 100% of our TLP residents exited to another safe living situation. Our long term goal is to prepare youth for sustainable independent living, and prevent them from becoming homeless adults.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Yes. In the past 12 months, we have partnered with ECHO to implement two HUD Youth Homelessness Demonstration Program initiatives that provide Youth Rapid Rehousing + Case Management opportunities and a System Navigator / Case Manager to provide increased support to youth in the community. In the past 6 months, we were awarded Rock County ARPA funds to hire a Youth Outreach Specialist who has regular drop-in hours at various locations around the county, including Beloit Public Library. She also will be at the Rising Tide Center when it opens. The grants for these initiatives fund the 3 positions and the rent assistance, but not the costs associated with other direct assistance / supportive services that we are requesting funds for in this application.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

Project 16:49 is unique in that it is the only organization dedicated specifically to serving the community's unhoused youth population. This population has a different set of needs than the adult homeless population, as many of these youth still are in high school, and all are learning to transition into adulthood and independent living. Project 16:49 works to empower and support these youth, ensuring they have access to the services they need. We often participate in case conferencing with other agencies to _____XXXXXX

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Project 16:49 collaborates with numerous community partners to avoid duplication of services, maximize resources, and ensure youth are provided the best possible service/care. Case managers work with youth to gain access to the resources they need and the services for which they are eligible. Case managers ensure youth know how to navigate the necessary systems in which they receive support and services. Project 16:49 works closely with:

* The School District of Beloit and Community Action Fresh Start- to ensure identified students have their basic needs

met, are safe, and are receiving the services they need to focus on completing their education

- * Southern Consortium - to enroll youth in Foodshare and state health insurance
- * Beloit Area Community Health Center, Vivant Health - for healthcare and related services
- * Stateline Mental Health Services, Sexual Assault Recovery Program - for professional counseling
- * Rock County Job Center - for employment and training resources and assistance, particularly WIOA
- * ECHO, Community Action, City of Beloit - for housing assistance programs
- * Caritas, Salvation Army, Second Harvest Food Bank - for food assistance
- * WIC, Pregnancy Helpline - support and resources for our pregnant or parenting youth
- * UW Extension, Family Services, Community Action Prep Program, and local financial institutions - to assist with life skills education programming

Project 16:49 also is an active member of the Homeless Intervention Task Force and its youth subcommittee, Beloit Area Task Force on Homelessness (BATFoH) and its landlord engagement committee, and the Rock County Anti-Human Trafficking Task Force. We work with other member agencies to coordinate and ensure the most appropriate services to meet the youth's needs.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Project 16:49 has resource / contact cards available at BMHS, Beloit Learning Academy and Fresh Start; as well as, many of our community partners' locations, the emergency room, the library, and other locations youth may frequent. In addition, resource / contact cards are included in all backpacks, hygiene bags, food bags, winter supply bags and holiday gift bags that our organization distributes. We make numerous presentations in the community and in schools; and have an information booth at National Night Out and participate in other outreach opportunities, when staff is available. Our new Youth Outreach Specialist has established drop-in hours at the Library this summer, is working to establish a schedule at the Merrill Center, and will have a presence at the Rising Tide Center when it opens. She also will be providing life skills workshops at local high schools during the school year. We have a large social media presence and information on our website, as well.

I. Project Summary

Completed by tdegarmo@project1649.org on 8/15/2023 1:02 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

Project 16:49 will serve unaccompanied homeless youth ages 14-21 in the City of Beloit. Between 75-80% are ages 17-18. Most of our youth are working to complete their high school education or have recently graduated. 100% of the youth we have served have been extremely low or very low income; with more than 98% being extremely low income. Approximately 60-65% of youth served are female. Our organization is inclusive to all races and ethnicities and is LGBTQ+ friendly. Only female youth will be housed in our Beloit TLP.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Project 16:49 will provide case management and direct supportive services (below) to 35 homeless youth in the City of Beloit, including TLP and non-TLP residents. <ul style="list-style-type: none"> - Basic Needs Assistance - Physical and mental healthcare access, and related expenses and/or supplies - Food - Transportation - Identification documents - School & Work Access/Support Expenses - Rental Application Fees - Life skills education 	35	32	\$3,500.00
Q2 4/1/24-	Project 16:49 will provide	35	32	\$3,500.00

6/30/24	<p>case management and direct supportive services (below) to 35 homeless youth in the City of Beloit, including TLP and non-TLP residents.</p> <ul style="list-style-type: none"> - Basic Needs Assistance - Physical and mental healthcare access, and related expenses and/or supplies - Food - Transportation - Identification documents - School & Work Access/Support Expenses - Rental Application Fees - Life skills education 			
Q3 7/1/24-9/30/24	<p>Project 16:49 will provide case management and direct supportive services (below) to 40 homeless youth in the City of Beloit, including TLP and non-TLP residents.</p> <ul style="list-style-type: none"> - Basic Needs Assistance - Physical and mental healthcare access, and related expenses and/or supplies - Food - Transportation - Identification documents - School & Work Access/Support Expenses - Rental Application Fees - Life skills education 	40	36	\$4,000.00
Q4 10/1/24-12/31/24	<p>Project 16:49 will provide case management and direct supportive services (below) to 35 homeless youth in the City of Beloit, including TLP and non-TLP residents.</p> <ul style="list-style-type: none"> - Basic Needs Assistance - Physical and mental healthcare access, and 	35	32	\$4,000.00

	related expenses and/or supplies - Food - Transportation - Identification documents - School & Work Access/Support Expenses - Rental Application Fees - Life skills education			
				\$15,000.00

I.3. How will you measure the success of the program? (2 points)

Project success will be measured by youth (1) obtaining safe housing, and (2) increasing their self-sufficiency, as measured at intake and exit utilizing an age-appropriate variation of the HUD self-sufficiency matrix. Specific categories measured in the matrix include: housing, health care, education, food access, employment, income, transportation, financial literacy, family relationship, community involvement, mental health, and substance use. We arrange these under our 5 key areas of self-sufficiency: education, housing, employment/income, health, and social-emotional well-being. Our goal is for youth to see improved scores in at least 3 of the 5 key areas. Examples of significant accomplishments that would result in an increase are: graduating high school, acquiring post-secondary education or training, increasing employment / income (hours worked, pay rate, having benefits), moving into their own housing, ending reliance on public benefits (housing assistance programs, food and healthcare benefits, etc), owning a reliable vehicle, decreasing/ending substance use, .

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

Comprehensive case management is a core function of Project 16:49. Our case management services are age-appropriate and personalized to each youth's needs. Case managers work with youth to identify personal goals related to self-sufficiency and independent living. Additional mentoring and support is provided by Robin House youth assistants and college social work, human services, and psychology interns. Key components of case management are:

- enrollment in applicable state and local benefit programs (Foodshare, health insurance, housing assistance, etc)
- connection to community resources - referrals, awareness education, assistance with accessing services (transportation, advocacy)
- strengths and needs assessment
- assistance creating and individual action plan - goal setting in 5 key areas of self-sufficiency (see I.3), guidance in identifying next steps and support in addressing challenges/barriers, and regular reviews to ensure progress and accountability
- weekly meetings (or other regular schedule) with the case manager
- academic and vocational planning
- job search, interviewing and employment skills
- assistance identifying and obtaining safe, affordable housing options
- life and social skills education and mentoring
- development of a support network

After a youth exits our TLP or ends case management services, they are transitioned into aftercare services. During this process, the case manager works with youth to map out an aftercare plan that addresses the areas in which the youth feels they need continued support and services. The case manager performs check-ins (phone contacts, in person visits) at progressively widening intervals to see how the youth is doing and offer additional help, support and

guidance. Aftercare relationships typically include things like:

- limited transportation assistance - gas cards, bus tokens, occasional rides (especially medical or legal appointments when the youth would like to be accompanied)
- emergency basic needs items
- assistance renewing or updating benefits or financial aid, completing various applications
- guidance obtaining car insurance, loans, repairs, etc
- identifying and addressing any red flags that might jeopardize youth's stability
- guidance / advocacy interacting with a landlord or roommate, medical provider, other relational assistance
- referrals and connection to other community services, when needed

Youth are encouraged to stay in touch, and know they can contact or visit us at any time for help, guidance, connection and support -- and also to celebrate good news and accomplishments.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	0	0	0	0	0
31-50% CMI	3	3	4	2	6	3
0-31% CMI	35	35	40	38	65	62

J. Project Budget

Completed by tdegarmo@project1649.org on 8/15/2023 12:52 AM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Program Expenses	\$15,000.00
Total	\$15,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
------	-------	---------------------	----------------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Participant Support: Food (emergency and supplemental before Foodshare starts, over school breaks; group meals and household staples at TLP)	\$3,000.00
Participant Support: Transportation (rides to/from work or interviews, health appointments, appointments with other community agencies, grocery store, court)	\$4,500.00
Participant Support: Other Basic Needs (birth certificates, undergarments, laundry, health items)	\$3,000.00
Participant Support: School &	\$3,000.00

Work Access (unwaived fees, required work clothing / footwear,	
Participant Support: Rental App Fees	\$500.00
Household Supplies	\$500.00
Life Skills Education / Group Materials & Activities	\$500.00
Total	\$15,000.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$10,721.00	\$7,890.00	\$15,000.00
Contributions	\$133,925.00	\$134,558.00	\$132,936.00
Foundations & Venture Grants	\$40,000.00	\$40,000.00	\$35,000.00
Special Events	\$30,000.00	\$40,000.00	\$34,000.00
Legacies & Bequests	\$0.00	\$0.00	\$0.00

(unrestricted)			
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$0.00	\$77,655.00	\$104,334.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$214,646.00	\$300,103.00	\$321,270.00

Expenses

	Last Year's	Current Year's	Next Year's
--	-------------	----------------	-------------

	Actual (\$)	Budget (\$)	Proposed (\$)
Salaries	\$149,715.00	\$212,250.00	\$222,750.00
Employee Benefits	\$327.00	\$1,100.00	\$1,100.00
Payroll Taxes	\$11,977.00	\$17,163.00	\$17,820.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$1,599.00	\$1,300.00	\$1,500.00
Telephone	\$3,308.00	\$3,460.00	\$3,600.00
Postage	\$0.00	\$0.00	\$0.00
Occupancy (building grounds utilities)	\$33,029.00	\$35,180.00	\$38,500.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$873.00	\$5,500.00	\$2,000.00
Mileage for Staff	\$2,254.00	\$4,700.00	\$5,000.00
Conferences Conventions Meetings	\$1,536.00	\$2,350.00	\$2,500.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$9,528.00	\$16,600.00	\$26,000.00
Officers & Directors Liability Insurance	\$500.00	\$500.00	\$500.00

Misc. Expenses (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Expenses (Before Depreciation)	\$214,646.00	\$300,103.00	\$321,270.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
YHDP - Youth Homelessness Demonstration Program	\$60,000.00	1	N/A
City of Beloit ARPA Grant	\$44,334.00	1	N/A

K. Agency Capacity

Completed by tdegarmo@project1649.org on 8/14/2023 4:36 PM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

10

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

1) Community Development Block Grant / City of Beloit - 8 years - funding to provide transitional living and case management for unhoused youth

2) DHHS / FYSB Federal TLP Grant - 5 years - funding of nearly \$975,000 over 5 years to assist the start-up of our second TLP (boys TLP in Janesville)

3) Youth Homelessness Demonstration Project / Balance of State Continuum of Care - 1.5 years - direct recipient from Balance of State of planning grant funds to prepare a Coordinated Community Plan for addressing youth homelessness; currently partnering with ECHO to operate a Youth Rapid Rehousing program (we are subcontracted to provide coordinated entry services, housing identification assistance, and case management), and to supervise the Youth System Navigator position

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

No



Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No



Citizen Complaints/Negative Media Exposure

Printed By: Brian Gile on 8/16/2023

29 of 32

***No files uploaded*

L. Staffing Capacity

Completed by tdegarmo@project1649.org on 8/15/2023 2:06 AM

Case Id: 30172

Name: Project 16:49 Homeless Youth Services - 2024

Address: 2911 CARROUSEL LN, JANESVILLE, WI 53545

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Case Manager Maggie King will be responsible for program implementation and outcomes, and providing pertinent information for required reporting for youth residing in our Robin House transitional living program home in Beloit, as well as, any Beloit youth she is working with in the community. This could be youth on our waitlist, former residents receiving aftercare support, and/or youth who are in host homes but need case management support. Maggie has been with the organization 4.5 years, including 1 year in program management and 2 years in an assistant case manager role. She has assisted with required reporting for our CDBG grant for the past 1.5 years.

Case Manager Hannah Haakenson will be responsible for program implementation and outcomes, and providing pertinent information for required reporting for Beloit youth enrolled in the youth rapid rehousing program. Hannah has been with the organization for 7 years, including 4 years in program management, and 5 years of assisting with required reporting for both our CDBG and Federal TLP grants.

System Navigator / Community Case Manager Jessica Pfeifer will be responsible for program implementation and outcomes, and providing pertinent information for required reporting for Beloit youth who are receiving case management but not living in our TLP. Jess has been with the organization for 3 years.

Executive Director Tammy DeGarmo will provide supervision of the above employees, ensure program compliance and integrity, and complete/submit required reporting. She also will oversee proper use and coding of funds. Tammy has served in this position for 10 years, and has been responsible for oversight and reporting on all grants received by the organization.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Project 16:49 contracts with Husch Services for payroll and accounting, including grant financial management. Husch Services specializes in non-profit accounting, and has 25+ years experience in the field. Husch has extensive experience in the administration of client's Federal grant funds, including: DHHS/FYSB Transitional Living Program grant and multiple HUD-funded programs.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

Husch Services utilizes the Orion financial accounting system, developed to meet the specific accounting needs of non-

Printed By: Brian Gile on 8/16/2023

31 of 32

profit organizations. CDBG funds are assigned a specific account code in the system, which designates their restricted use. Project 16:49's time sheet has a separate column for recording case management hours charged to the grant; and receipts for any expenses being charged to the grant are coded as such, signed by the case manager, approved by the executive director, and submitted to Husch Services for review and recording. Reports can be printed to show the grant budget, expenses to date by category (wages, participant food, transportation, etc), and unexpended / remaining balance.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

Youth's individual data is discussed / collected during the intake interview, documented in the youth's file, and entered in the Homeless Management Information System (HMIS). Data includes income information from all sources (employment, food share benefits, SSI, etc) and basic demographic information (age, gender, race, ethnicity, etc). Changes in employment, income and/or benefit information is collected during weekly 1-on-1's and documented in HMIS.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

During intake, the case manager verifies each youth has a state ID, birth certificate and social security card. If a youth is in need of one or more of these items, the case manager works with them to obtain the necessary document(s). The last four digits of youth's social security number are noted in their intake and initialed by the case manager to verify citizenship.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

The unaccompanied homeless youth population we serve, by definition, do not have a permanent nighttime residence. When youth move into the TLP, they become residents of the City of Beloit. For non-TLP youth, we verify where they attend school and/or where they last lived when housed.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30169
Name: SLC - Adult Education for Economic Opportunity
Address: 605 Eclipse Blvd., Beloit, WI 53511

Completed by gileb@beloitwi.gov on 8/8/2023 5:53 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name
Stateline Literacy Council - Beloit, Inc.

A.2. Organization Address
605 Eclipse Blvd. Beloit, WI 53511

A.3. Phone Number
(608) 362-5207

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #
967962408

A.6. Agency CAGE/SAM #
6DQVO

A.7. Executive Director/Chairperson
Alejandra Lopez

A.8. Email Address
lopez@slcbeloit.org

A.9. Legal Status
Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?
Yes

If yes, for approximately how many years?
16

PROJECT INFORMATION

A.11. Project Name
Adult Education for Economic Opportunity

PRIMARY CONTACT #1

A.12. First Name
Alejandra

A.13. Last Name
Lopez

A.14. Email Address
lopez@slcbeloit.org

A.15. Phone Number
(608) 362-5207

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name
Sharon

A.17. Last Name
Alcala

A.18. Email
alcala@slcbeloit.org

A.19. Phone Number
(608) 362-5207

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by statelitbeloit@gmail.com on 6/26/2023 1:42 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

SLC will address these three national objectives by attracting, serving, and educating low-income, low-English-literate residents in the City of Beloit who seek to improve their employment outcomes. SLC is located in the Beloit Public Library, which is within census tract 18—the Merrill Neighborhood—providing easy access to some of the most vulnerable residents in the Neighborhood Revitalization Strategy Area (NRSA). The library is also located on the bus line which can assist individuals who do not own or cannot drive a car.

SLC's two flagship programs: the English Language Learner Program and Spanish GED Preparation Program both aim to reduce the poverty rate and increase the literacy rate here in the City of Beloit. When residents achieve intermediate English proficiency or a GED diploma, they earn between \$10,000-\$12,000 more per year than their peers without these skills or credentials (census.gov). Over 90% of SLC's adult learners qualify as very low to moderate income, with over 61% being very low income. 90% of learners participating in SLC programs exhibit low levels of literacy upon initial registration as measured by the National Reporting System (NRS). SLC learners fall into the three lowest levels of NRS standards, which are Below Basic, Basic, and Low Intermediate English proficiency. These measures are assessed using

Printed By: Brian Gile on 8/16/2023

3 of 27

the CASAS assessment, a national measurement tool use throughout the state of Wisconsin at the Technical College level. Once assessed, learners are then grouped by their appropriate level of literacy skill into group classes that help them achieve English proficiency or a GED diploma.

Additionally, SLC offers tutoring and case management services to all enrolled participants to help them solidify their learning and employment goals and also assist learners in gaining access to other services they might be eligible for including W2, WIC, FoodShare, etc.

And most recently, SLC started offering a summer Digital Literacy class to help learners develop more skills for better jobs. Being digitally illiterate directly impacts where someone works. If someone is digitally illiterate, they work in an unskilled occupation and are typically laborers, which means they are earning a low wage. SLC is actively looking for funds to be able to continue offering Digital Literacy classes and providing quality education and workforce preparation for our learners.

C. Project Type

Completed by statelitbeloit@gmail.com on 6/26/2023 1:42 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

5 of 27

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Providing a basic education for low-income, low-English-literate adults will enhance their ability to attain and retain employment, increase their household income, and contribute meaningfully to our community. When adult learners obtain intermediate levels of English language proficiency and/or a GED they earn between \$10,000 - \$12,000 per year. SLC's programming is designed to assist these learners in achieving their GED or improving their English skills quickly so they see improved employment outcomes within 1-2 years of registering for our programs. SLC will also provide childcare for program participants on an as-needed basis. Childcare for adult learners is one of the biggest barriers to educational advancement and SLC is excited to offer this service because it provides parents and caretakers the opportunity to achieve their goals while their children are still young.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by statelitbeloit@gmail.com on 6/26/2023 1:42 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

SLC will address the Consolidated Plan goal checked above by providing low-cost access to English language literacy classes as well as GED classes and will also try to continue offering Digital Literacy at the Beloit Public Library. As mentioned previously, these classes and training have a direct impact on employment outcomes, and once a GED diploma, digital skills are developing or intermediate English literacy is achieved, individuals make up to \$10-\$12,000 more than their peers without these credentials. SLC's programming includes case management services that include individual goal setting, referral to and assistance in navigating other local community resources including but not limited to the YWCA's Immigrant Outreach Program, la Voz Spanish Newspaper and Wisconsin Contigo programming, the Beloit Public Library, the Sexual Assault Recovery Program, W2, FoodShare, FSET, WIC, and legal services as needed. Engaging residents with the library is a great way to get them involved in the community and educate them on the variety of free services and programs that are available on daily basis. All-told, the increase of Latino residents in the library due to SLC programming helps to improve race relations in the Beloit community and establish connections and collaborations that would not otherwise exist.

E. Conflict of Interest

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

Completed by statelitbeloit@gmail.com on 6/26/2023 12:31 PM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by statelitbeloit@gmail.com on 6/29/2023 11:40 AM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

Current Board of Directors 2023 - W_new logo - Google Docs.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

articles of incorporation.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

IRS Letter 2018 - 501c3 Nonprofit Status (3) (2).pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Combined Approvals.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

9 of 27

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required*

Designation of authorized person signed.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required*

Org Chart 2024 - Google Docs.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Audit statement signed.pdf

G. Funding Priorities

Completed by statelitbeloit@gmail.com on 7/25/2023 9:57 AM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

SLC will address the funding priority checked above by providing low-cost access to English as a Second language as well

as GED classes and most recently added Digital Literacy courses to adults at the Beloit Public Library. These classes have a direct impact on employment outcomes and represent an opportunity for our learners to make up to \$10,000 more per year than those with out these credentials. SLC's programming includes case management services that provide individual goal-setting, referral to and navigation help with other local community resources including but not limited to the YWCA's immigrant outreach program, Unite Us, Wisconsin Contigo Newspaper programming, the Beloit Public Library, the Sexual Assault Recovery Program, W2, FoodShare, FSET, WIC and legal services as needed. Engaging residents with the library is a great way to get them involved in the community and educate them on the variety of free services and programs that are available on a daily basis. All-told, the increase of Latino residents in the library due to SLC programming helps to improve race relations in the Beloit community and establish connections and collaborations that would not exist otherwise.

H. Agency Summary

Completed by statelitbeloit@gmail.com on 8/15/2023 8:30 AM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Stateline Literacy Council - Beloit, Inc. (SLC) was formed in 1972 by the Federated Women's Club of Beloit. SLC was granted nonprofit 501 (c) 3 status in April of 1987. SLC has been in continuous operation for over 51 years and has been a United Way Blackhawk Funded Program since 1993 and most recently funded by Hendricks Family Foundation. The mission of SLC is to improve lives through literacy. SLC works with low-income and low-literate residents in the City of Beloit to help them improve their employment outcomes through English and GED classes and workplace training.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

SLC will provide the following services:

- On-site childcare
- Basic thru intermediate English courses and tutoring
- GED training and preparation in Spanish
- Citizenship test preparation and case management
- Workplace literacy courses
- Off-site workplace literacy courses
- Digital literacy training
- Individual goal setting and case management
- Virtual program offerings as needed

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

According to the U.S. Census, Rock County's Hispanic population is 9.7%, Beloit's is 21.1% and many of those families do not have any English Literacy skills. SLC's English Language Learner program is designed to offer 150 hours of English instruction per year to assist this demographic in achieving intermediate English proficiency. National data shows that adults with an intermediate level of English will earn \$11,000 or more per year than those who do not know English (census.gov). Providing a basic education for low-income, low-English-literate adults will enhance their ability to attain and retain employment, increase their household income, and contribute meaningfully to our community. Over 95% of SLC's current learners are Hispanic/Latinx where 50% of these learners exhibit low levels of English literacy skills and about 70% of them are low income.

Also full-time workers aged 25 and over without a high school diploma had median weekly earnings of \$675, compared with \$875 for high school graduates (no college). That's an annual difference of \$10,400. The city of Beloit currently has

Printed By: Brian Gile on 8/16/2023

13 of 27

a 11.6% rate of residents who do not have a high school diploma or its equivalent. What's more is that among Hispanic adults in particular 31% have less than a high school diploma. Only 27% of jobs do not require a GED, but they are often very low-wage and fall below the federal poverty line (bls.gov).

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Due to higher demand most specifically on the beginner level, SLC expanded it's services on the last 12 months and offered a Basic ESL class which gave us the opportunity of avoiding a wait list and separated new learners that where just starting with the language from returners that are still in need of improvement but on a higher beginner level. With the support of one of our volunteer tutors we were also able to provide ESL level one classes on Saturdays to students that were getting registered in the middle of the semester and would have been place on a waitlist due to capacity.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

The Adult Education for Economic Opportunity Project is unique to the City of Beloit in that it is the only literacy and training program in the City of Beloit to serve low-income and low-literate adults with their educational goals whether they speak English or Spanish. SLC is a fully bilingual agency and all program staff are bilingual and able to assist program participants regardless of language skills. SLC is the only agency in the City of Beloit to offer GED classes in Spanish and works closely with Blackhawk Technical College to coordinate English offerings to ensure no duplication of services. Most recently SLC started offering Digital Literacy lessons to interested learners to help them improve their work skills and to provide certificates once a proctored test is taken and passed.

SLC operates both in the morning and the evening to accommodate the shift work that is often associated with lower wage jobs. SLC operates over three seasons, summer, fall and spring, again to accommodate short-term work slow-downs and breaks often associated with low-wage factory and production work.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

SLC works closely with the following agencies:

- The Beloit Public Library
- Blackhawk Technical College
- The YWCA of Rock County
- Even Start Family Literacy
- Community Action
- Latino Service Providers
- La Voz de Beloit
- Wisconsin Contigo
- Sexual Assault Recovery Program
- Wisconsin Literacy
- SSM Health
- Unite Us

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

With the collaboration of other organizations such as the YWCA of Rock County, The Beloit Public Library, Beloit College, and local newspapers such as Wisconsin Contigo and La Voz de Beloit, and also with the support of staff and volunteer members, SLC will continue informing the community about our upcoming programs, services offered and upcoming

events. SLC will also continue reaching out to local factories and providing brochures with information of our programs as well as assisting to different community events to continue our involvement and provide information about our programs.

I. Project Summary

Completed by statelitbeloit@gmail.com on 8/1/2023 6:20 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

The target population for this project is adults ranging in age from 18-65 who are low to moderate-income and also low-literate in either English or Spanish. SLC anticipates that between 90-95% of participants will be Hispanic/Latino and about 55% female and 45% male.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	17 learners will continue classes in the spring semester which begins late January and will consist of 45 hours of instruction. (14 weeks) GED, English, and Workplace trainings will take place during this time.	20	18	\$4,000.00
Q2 4/1/24-6/30/24	10 learners will finish the semester (30 hours of instruction), due to changes from working shifts. All learners will take a ESL CASAS computer based locator test or GED subject test to track their progress. A spring graduation celebration will take place. Summer classes will begin in June and continue until July with an	10	10	\$3,000.00

	emphasis on workplace training.			
Q3 7/1/24-9/30/24	25 learners will finish summer classes for a total of 30 hours that will be mostly structured for Workforce preparation, Digital Literacy skills as well as GED and they will then enroll in fall classes which will begin in September. All new and returning learners will take a CASAS computer based locator or post- test or GED subject test to track progress. Individual goals will be set with all learners and goals check ups will take place with returning learners.	25	25	\$4,000.00
Q4 10/1/24-12/31/24	20 learners will finish the fall semester for a total of 45 hours of instruction this quarter in workplace training, English, and GED. Learners will be post-tested and given certificates of completion for their accomplishments. Learners that joined the Digital Literacy software to continue working on their own will also be able to take proctored tests at SLC at anytime to obtain certificates of completion.	20	20	\$3,000.00
				\$14,000.00

I.3. How will you measure the success of the program? (2 points)

Learner success is measured by increased English proficiency as documented by classroom performance and participation by using our new computer-based standardized assessment, CASAS, which is now acting as an excellent measure of student progress that is easier to administer and take. Since 2018, SLC has maintained a score increase rate of 50% when learners attend at least 75 hours of instruction per year which is aligned with national and local testing standards. We can now analyze more precisely the percentage of improvement by area from every student. Importantly, learner success is also measured by employment outcomes and wage information, which has been tracked in more detail in the last year. SLC expects 80% of learners to see a wage increase or earn full time employment within one year of reaching intermediate English proficiency. Program success will also be measured by

scores on GED subject pre-tests and classroom performance and participation. Since 2018, SLC has maintained a student average of one completed GED subject test per semester with a full GED certificate in as little as 10 months but up to three years. This depends heavily on learner attendance and persistence but also on support from our qualified instructors. When learners attend at least 75 hours of instruction per year, they pass 1-2 GED subject tests. SLC students take their GED tests through Blackhawk Technical College in Spanish and report their results back to SLC. Importantly, learner success is also measured by employment outcomes and wage information, which has been tracked in more detail in the last 2 years. SLC expects 80% of learners to see a wage increase or earn full time employment within one year of attaining their GED.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

SLC's programming provides case management services that includes individual goal-setting, referral to and navigation help with other local community resources including but not limited to the YWCA's immigrant outreach program, Wisconsin Contigo Spanish Newspaper programming, the Beloit Public Library, the Sexual Assault Recovery Program, W2, FoodShare, FSET, WIC and legal services as needed. And now SLC has joined Unites Us Network which connects several organizations and all types of services available for the community where we are able to send and receive referrals for services requested by the community we serve.

SLC prides itself on having a small staff that builds a trusting relationship with each program participant and can thus be a point of contact to help navigate difficult life issues such as joblessness, homelessness, legal issues, food insecurity, abuse and neglect among others.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	1	1	0	0	1	1
51-80% CMI	2	1	11	9	3	3
31-50% CMI	21	20	18	1	22	20
0-31% CMI	19	18	10	10	23	23

J. Project Budget

Completed by statelitbeloit@gmail.com on 8/1/2023 6:21 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

- 1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
- 2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

- 1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
- 2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Wages/Books/Materials	\$14,000.00
Total	\$14,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual	Total Annual
------	-------	--------------	--------------

		Salary	Benefit Costs
Alejandra Lopez	Executive Director	\$30,000.00	0
TBD	Associate Director	\$10,000.00	0
Andrew Kopecky	ELL Instructor	\$5,180.00	0
Karla Robledo	GED Instructor	\$7,000.00	0
Cristina Parente	Digital/ELL Instructor	\$5,180.00	0
TBD	ELL Instructor	\$5,180.00	0

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)

Community Development Block Grant (CDBG)	\$24,000.00	\$9,890.00	\$14,000.00
Contributions	\$12,634.02	\$10,000.00	\$12,000.00
Foundations & Venture Grants	\$8,402.04	\$28,000.00	\$28,000.00
Special Events	\$1,869.91	\$5,000.00	\$5,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$0.00	\$0.00	\$0.00
Blackhawk Region United Way	\$36,000.00	\$38,000.00	\$38,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$17,725.00	\$7,110.00	\$7,000.00
Sales-Materials	\$105.00	\$0.00	\$0.00
Services	\$0.00	\$12,000.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00

Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$100,735.97	\$110,000.00	\$104,000.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$68,835.03	\$72,719.14	\$73,000.00
Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$5,496.40	\$5,817.53	\$6,500.00
Professional Fees	\$5,246.43	\$6,000.00	\$6,200.00
Supplies	\$4,250.33	\$4,711.42	\$5,000.00
Telephone	\$0.00	\$0.00	\$0.00
Postage	\$0.00	\$0.00	\$0.00
Occupancy (building grounds utilities)	\$666.83	\$1,500.00	\$1,500.00
Equipment Rental & Maintenance	\$0.00	\$1,850.00	\$2,200.00
Printing Art Work Publications	\$260.00	\$500.00	\$500.00

Mileage for Staff	\$68.98	\$0.00	\$0.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$216.30	\$2,563.40	\$2,500.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$2,755.00	\$3,000.00	\$3,300.00
Misc. Expenses (not otherwise listed)	\$0.00	\$3,759.04	\$1,500.00
Total Expenses (Before Depreciation)	\$87,795.30	\$102,420.53	\$102,200.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$12,940.60	\$7,579.47	\$2,000.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
------------------------------	---------------	----------------------------	---

K. Agency Capacity

Completed by statelitbeloit@gmail.com on 8/8/2023 5:12 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

SLC is a non-profit organization which was formed in 1972 by the Federated Women's Club of Beloit. SLC was granted nonprofit 501(c)3 status in April of 1987. SLC has been in continuous operation for over 51 years.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

SLC has been receiving and administering CDBG funding since 2006 where the organization has always made sure to comply with the CDBG program requirements.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

SLC hasn't had any findings or concerns with any grant that has been received.

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

SLC hasn't have any citizen complaints or negative media exposure in the last three years. On the contrary our program has been growing based on recommendations and referrals.

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by statelitbeloit@gmail.com on 8/1/2023 6:21 PM

Case Id: 30169

Name: SLC - Adult Education for Economic Opportunity

Address: 605 Eclipse Blvd., Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

The Associate Director will be in charge of entering and maintaining accurate and updated student information in the database which will provide the Executive Director with the necessary information for Grant reporting. It is the Executive Director who will oversee the implementation of this program as well as reporting every quarter and will also be responsible for rendering the required information during the monitoring of the program.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

SLC works with the professional staff at Advantage Accounting, and private accounting firm in Beloit, to manage the agency's financials. Expenditures are tracked by the Executive Director and reviewed and authorized by the SLC Board Treasurer.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

Advantage Accounting uses QuickBooks to track all CDBG-related expenditures including staff salaries and supplies. Time sheets reflect staff hours worked by program and are coded within QuickBooks to ensure accurate accounting of all CDBG expenses. Eligible program participants are verified at the time of registration via a paper registration form and are stored in file cabinets as well as backed up on Google drive and the agency database "Achieve" .

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

Upon initial registration, SLC participants are asked to provide income information that is verified by a paystub or e-deposit as well as general information such as race and ethnicity among others. Also SLC has started tracking income and job improvement on learners every semester by surveys that each learner has to fill when registering to classes.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Upon initial registration, SLC participants are asked to show a social security card , proof of employment authorization, or residency status via the appropriate documentation.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Upon initial registration, SLC participants are asked to provide address information via a bill or driver's license. Each address is verified using the U.S. Census Geocoder which includes city and town information of each address.

Printed By: Brian Gile on 8/16/2023

26 of 27

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30181
Name: The Salvation Army Rock County - 2024
Address: 514 Sutherland Ave, Janesville, WI 53545

Completed by tamara.prochazka@usc.salvationarmy.org on 7/3/2023 9:32 AM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Salvation Army Rock County

A.2. Organization Address

514 Sutherland Ave Janesville, WI 53545

A.3. Phone Number

(608) 757-8300

A.4. Fax Number

(608) 757-8310

A.5. Unique Entity Identifier (UEI) #

150777253

A.6. Agency CAGE/SAM #

32HN1/150777253

A.7. Executive Director/Chairperson

Lt. Jason Rysdyk

A.8. Email Address

jason.rysdyk@usc.salvationarmy.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

5

PROJECT INFORMATION

A.11. Project Name

Supportive Services

PRIMARY CONTACT #1

A.12. First Name

Jason

A.13. Last Name

Rysdyk

A.14. Email Address

jason.rysdyk@usc.salvationarmy.org

A.15. Phone Number

(608) 757-8300

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Tamara

A.17. Last Name

Prochazka

A.18. Email

tamara.prochazka@usc.salvationarmy.org

A.19. Phone Number

(608) 757-8300

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by erica.dvoratchek@usc.salvationarmy.org on
7/6/2023 2:05 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

The rent assistance program will provide low to moderate income individuals/families with up to three months' rent assistance in coordination with case management. The person will reside within the City of Beloit and will include abused children, elderly person, battered spouses, homeless persons, severely disable persons, illiterate adults, person living with AIDS and migrant farm workers.

C. Project Type

Completed by erica.dvoratchek@usc.salvationarmy.org on
7/6/2023 2:05 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. Public Services – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning

C.2. Non Public Services Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition,

- Subsistence Payments (one time or short term emergency payments on behalf of clients.)
- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

construction, reconstruction, rehabilitation, or installation of public facilities and improvements

Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services

Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

The rent program case managers will work with individuals/families to remain in their housing. They may be in danger of falling behind in rent, or may already be behind in rent and in danger of being evicted. Case management includes determining the financial need (full/partial rent amount and/or one month rent or multiple months needed), and budgeting. Case management may be one or more meetings depending on the individual/family need or situation. Individuals/families are provided with other resources available in their community to assist with rent and/or other services they may be able to utilize to help them to become stable. The case manager may assist clients in making these connections if the client is not able to do so on their own.

D. Consolidated Plan Goal

Completed by erica.dvoratchek@usc.salvationarmy.org on
7/6/2023 2:05 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

The rent assistance provided will allow at risk individuals/families to remain in their home. Providing case management and working on budgeting will assist the individuals/families to become financially stable. Connecting them to other resources in the community will make them aware of programs that can assist them not only currently but also in the future with other programs (food, utility, transportation, life skill classes, employment related needs, child care, etc.) as well as housing.

E. Conflict of Interest

Completed by erica.dvoratchek@usc.salvationarmy.org on
7/6/2023 2:05 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by erica.dvoratchek@usc.salvationarmy.org on
7/6/2023 8:20 AM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

AB Member Sheet.7.2023.docx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles of Incorporation 3-19.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

WI Tax Exempt Updated 2021.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Designation of Auth.2023.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to

*negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

Designation of Auth.2023.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

TSA-RC Org Chart.2023.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Rock County Final Audited Financial Statement.2021-22.pdf

G. Funding Priorities

Completed by tamara.prochazka@usc.salvationarmy.org on 8/9/2023 8:31 AM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The rent assistance provided to at risk families/individuals will allow them to stay in their home. Providing case

Printed By: Brian Gile on 8/16/2023

10 of 24

management including, but not limited to, budgeting will assist them to become financially stable while remaining in their home.

Connecting them to other community resources will make them aware of programs in their community that can assist them with housing, food, children, medical/mental health programs, etc. Knowledge of these resources will not only assist them currently but in the future as well.

H. Agency Summary

Completed by erica.dvoratchek@usc.salvationarmy.org on
8/14/2023 12:17 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

The Salvation Army, an international movement, is an evangelical part of the universal Christian Church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His Name without discrimination.

Founded in 1865, opened in the City of Beloit in 1866, Private Non-Profit, 501(c)3.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

The Salvation Army Rock County will use the funding to provide rent assistance to families/individuals who reside in the City of Beloit.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Rental assistance for low to moderate income families in our community is vital. Some families/individuals are now recovering from the pandemic, others have had health issues creating loss of income/medical expenses. Some are finding employment but earning less than they earned pre-pandemic. As they are becoming stable assisting with 1-3 months enables them to become stable and self-sufficient. This is verified through food stamp award letters, income verification, etc. In 2021 - 9 Individuals and 3 families were provided rent assistance. In 2022 - 2 Individuals and 6 families received assistance. In 2021 families were receiving stimulus payments and other benefits due to the pandemic whereas single individuals were not. In 2023 to date 2 Individuals and 3 families have been assisted. One family was due to health issues and losing supplemental income, the other two families were loss of employment and once securing employment needed assistance to get caught up, The 2 individuals reduced hours and status in employment.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

The program has remained consistent. How many households we serve depends on how many months of assistance a household receives (1-3 months). Our funding was less in 2023 so fewer households will be served. Rent has also increased which means rent assistance payments are larger.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already

Printed By: Brian Gile on 8/16/2023

12 of 24

provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

The Salvation Army provides rent assistance and ongoing case management to all populations needing rent assistance. Case management consists of budgeting, life skills, and working with a case manager to maintain/establish a good relationship between tenant and landlord. It may include assistance with establishing a rent payment plan if they have a past due rent after receiving assistance. Case management can continue once assistance is provided if the family/individual wishes.

There are other programs available to assist with rent that have restrictions such as target populations including Domestic Violence, Individuals with no children, Veterans, etc., one time assistance, case management is limited to service only, not ongoing.

A case manager will assist clients in collaborating with other resources that can assist them. This can happen while the client is with the case worker in the office or the client can provide a written release for The Salvation Army Case Manager to be able to speak with other agencies on their behalf. Determination will be made as to which services which agency can provide and assist the client most effectively.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Community Action of Rock and Walworth Counties, ECHO, House of Mercy, Family Promise of Greater Beloit, GIFTS Men's Shelter, Rock County Human Services,

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Information about rent assistance is on The Salvation Army website and fliers that are available in the waiting area. Fliers/brochures are distributed at community outreach events i.e. school, church, etc. United Way 2-1-1, community agencies i.e. Community Action, ECHO, all have information to distribute as well as refer clients to The Salvation Army.

I. Project Summary

Completed by erica.dvoratchek@usc.salvationarmy.org on 8/14/2023 12:17 PM

Case Id: 30181
Name: The Salvation Army Rock County - 2024
Address: 514 Sutherland Ave, Janesville, WI 53545

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

The population to be served will be residents who reside in the City of Beloit. The Head of Household will be 18 or older and come from a variety of ethnicities, gender, special needs, veterans, individuals or families, etc.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Rent Assistance	5	3	\$3,000.00
Q2 4/1/24-6/30/24	Rent Assistance	4	3	\$3,000.00
Q3 7/1/24-9/30/24	Rent Assistance	7	3	\$3,000.00
Q4 10/1/24-12/31/24	Rent Assistance	7	3	\$3,000.00
				\$12,000.00

I.3. How will you measure the success of the program? (2 points)

Client success is measured individually as the family becomes current with their rent and are able to remain in their home. They will have the knowledge of community resources to assist them in the future not only with rent but additional needs they may need/want in the future.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

The families/individuals can continue with case management for up to a year. After a year they can request case management as needed and it can be a one time case management appointment or ongoing case management consisting of multiple appointments.

The Salvation Army offers Pathway to Hope Approach to families who feel they would benefit and like to participate in

intense case management. The families work together with a case manager to identify the families needs, goals and strengths. A case management plan is created based on the families goals which are determined by the family and unique to them. A series of assessments are created at the initial case management meeting and then periodically during the program to monitor their progress, successes, and measure hope while working towards achieving their goals. Pathway to Hope is a holistic program and is voluntary and offers support, networking, and a sense of community.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	2	1	0	0	1	1
31-50% CMI	2	0	3	1	5	2
0-31% CMI	16	8	7	4	20	9

J. Project Budget

Completed by erica.dvoratchek@usc.salvationarmy.org on 8/15/2023 9:30 AM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients
Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Emergency Rental Assistance	\$12,000.00
Total	\$12,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
------	-------	---------------------	----------------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Emergency Rental Assistance	\$12,000.00
Total	\$12,000.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$10,000.00	\$7,890.00	\$12,000.00
Contributions	\$845,238.11	\$774,593.00	\$721,926.00
Foundations & Venture Grants	\$26,292.12	\$45,250.00	\$65,250.00
Special Events	\$11,456.22	\$2,500.00	\$5,000.00
Legacies & Bequests	\$0.00	\$0.00	\$0.00

(unrestricted)			
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$15,391.00	\$0.00	\$0.00
Blackhawk Region United Way	\$86,125.00	\$84,662.00	\$89,741.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$24,920.00	\$18,400.00	\$10,250.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$969.79	\$0.00	\$0.00
Investment Income	\$43,425.41	\$265,605.00	\$342,147.00
Misc. Revenue (not otherwise listed)	\$759,222.20	\$200,800.00	\$300,000.00
Total Support	\$1,823,039.85	\$1,399,700.00	\$1,546,314.00

and Revenue			
-------------	--	--	--

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$350,728.02	\$375,243.00	\$386,049.00
Employee Benefits	\$93,686.73	\$110,993.00	\$131,406.00
Payroll Taxes	\$27,413.00	\$27,681.00	\$30,662.00
Professional Fees	\$42,230.55	\$58,656.00	\$64,526.00
Supplies	\$21,833.46	\$11,430.00	\$13,800.00
Telephone	\$15,089.42	\$12,530.00	\$14,900.00
Postage	\$25,488.28	\$21,334.00	\$25,200.00
Occupancy (building grounds utilities)	\$200,943.98	\$168,968.00	\$134,610.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$37,605.70	\$36,174.00	\$37,700.00
Mileage for Staff	\$0.00	\$0.00	\$0.00
Conferences Conventions Meetings	\$13,387.97	\$5,800.00	\$8,075.00

Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$105,446.50	\$91,484.00	\$67,304.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00
Misc. Expenses (not otherwise listed)	\$992,080.39	\$413,634.00	\$612,580.00
Total Expenses (Before Depreciation)	\$1,925,934.00	\$1,333,927.00	\$1,526,812.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	(\$102,894.15)	\$65,773.00	\$19,502.00
Depreciation	\$2,171.00	\$9,008.00	\$9,008.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years	Findings resulting in the loss of the
-----------------------	--------	------------	---------------------------------------

		Received	funding?
United Way/EFSP	\$15,391.00	3	Loss of funding due to staff turn over compliance. Compliance has been corrected.

K. Agency Capacity

Completed by erica.dvoratchek@usc.salvationarmy.org on
8/14/2023 3:48 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

5 as the Red Shield Center. The Salvation Army has been providing services in Beloit since 1878.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

Current staff have worked with Grants locally for the past 19 years. The Salvation Army has worked with Grants throughout history and are supported by Divisional Headquarters.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

There have been no issues with audits. The compliance issue with The United Way/EFSP funding was not in compliance due to staff change during Covid. This has been corrected and documentation attached.



Audit Documents

Subsequent Clearing 37 & Cares LRO.pdf

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No.



Citizen Complaints/Negative Media Exposure

Subsequent Clearing 37 & Cares LRO.pdf

L. Staffing Capacity

Completed by erica.dvoratchek@usc.salvationarmy.org on 8/14/2023 3:49 PM

Case Id: 30181

Name: The Salvation Army Rock County - 2024

Address: 514 Sutherland Ave, Janesville, WI 53545

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Anne Walli - Case Manager

Tami Prochazka - Social Service Director

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Erica Dvoratchek - Business Coordinator. She has worked with all incoming Grants for 2.5 years.

Jennifer Rysdyk - Salvation Army Officer. She has worked with Grant programs over the past 20 years.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

The Salvation Army accounting/chart account has a line item specific to track both income and expenses for CDBG Funding. Also, the Business Coordinator tracks all financial assistance through for all CDBG Funding and other grant funding sources.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

The Salvation Army utilizes System Information Management System (SIMS). Client information is entered for each individual and services are tracked in this system. Monthly reports are run to provide statistical data.

Clients provide income verification including employment, SSI, SSDI, child support, alimony, etc., and if applicable a complete food share letter.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Clients show photo ID's and complete a Declaration of Citizenship form provided by the City of Beloit. Social security cards are provided when meeting in person. On occasion social security numbers may be collected by phone.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Families/Individuals will provide address verification. The case manager will then verify that they are residents of the

City of Beloit by the map provided in this document as well as checking the Rock County Tax Database.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30194
Name: The Youth Unite - 2024
Address: 501 Prospect Street, Beloit, WI 53511

Completed by jodywittnebel@gmail.com on 7/7/2023 2:25 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

The Youth Unite

A.2. Organization Address

501 Prospect Street Beloit, WI 53511

A.3. Phone Number

(608) 362-1583

A.4. Fax Number

A.5. Unique Entity Identifier (UEI) #

In process

A.6. Agency CAGE/SAM #

A.7. Executive Director/Chairperson

Jody Wittnebel

A.8. Email Address

jodywitt@thecastlebeloit.com

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

No

PROJECT INFORMATION

A.11. Project Name

Brain Enhancement and Arts Education for the Merrill and Hackett Neighborhoods

PRIMARY CONTACT #1

A.12. First Name

Jody

A.13. Last Name

Wittnebel

A.14. Email Address

jodywitt@thecastlebeloit.com

A.15. Phone Number

(608) 346-3114

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Jacob

A.17. Last Name

Handrich

A.18. Email

sirjake@thecastlebeloit.com

A.19. Phone Number

(608) 302-1516

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by jodywittnebel@gmail.com on 7/7/2023 2:30 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

Our program will cater solely to families in the Merrill and Hackett neighborhoods through partnerships with the Merrill community Center and the Boys & Girls Club. It is designed to suite the needs of underprivileged youth by coming directly into the schools and Merrill Community Center and providing after-school activities; a time when many families especially need programs to occupy and educate the children.

C. Project Type

Completed by jodywittnebel@gmail.com on 7/7/2023 2:36 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 25

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Our program will give youth programs in the Arts that have longevity where they can bond and feel a part of a productive, growing community. Practicing the Arts is proven to support good mental health, and our program provides opportunities to provides space and activities for after-school children who don't otherwise have supervised extra-curricular activities.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

N/A

D. Consolidated Plan Goal

Completed by jodywittnebel@gmail.com on 7/7/2023 2:41 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

Beloit School District has almost 500 homeless students; after-school programs are essential. Music classes have been proven to enhance SAT scores by 61% - music is math and reading.

E. Conflict of Interest

Completed by jodywittnebel@gmail.com on 7/7/2023 2:41 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by jodywittnebel@gmail.com on 7/7/2023 2:43 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation



List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

Board of Directors.pdf



Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Incorporatin.PDF



Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

nonprofit.pdf



Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Meeting minutes.pdf



Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 25

the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required

Designation.PDF

Organizational Chart – Include only one copy

An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required

Chart.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

*****No files uploaded***

G. Funding Priorities

Completed by jodywittnebel@gmail.com on 8/15/2023 2:42 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The Youth Unite (TYU) will offer a variety of continuous brain enhancing programs that use music, art, and activities for

teaching metacognition, self-control, and other life skills for young people, adults and the elderly. Offering private and group music lessons on-location at the Merrill Center and community buildings that students can progress with as they age, and all members of the Merrill and Hackett communities have access to.

H. Agency Summary

Completed by jodywittnebel@gmail.com on 8/15/2023 2:42 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

TYU started in 2007 when founder Brittney Wittnebel, now Brittney Alter, Esq. was Miss Beloit, presenting character education and anti-bully assemblies. The organization incorporated in 2011 when she was Miss Madison. TYU's mission is to enhance youth through music, art, and bully-prevention. The last decade, TYU has grown to be a full-service music school and youth center serving many organizations in Beloit. TYU was incorporated in September 2010 and is a non stock issuing s-corporation that has the benefits of 501(c)3 tax exemption status as a non-profit entity.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

TYU will provide full music service and musical/arts education classes and opportunities to the Merrill/Hackett community including working with Mary Gut, Program Coordinator for Merrill Community Center.

Services will include a continued yearly schedule of after-school programs, summer camp starting in 2024, ukulele lessons, ukulele band, community music night, music recitals, participation in parades and concerts, early childhood education for parenting seminar, senior citizen and tots class, Music Therapy and lessons. This TYU Music School service will be new to the Merrill and Hackett neighborhoods but TYU has a proven track record in the community for providing the above mentioned curriculum and programs elsewhere in the community.

The Youth Unite currently operates a music school for local youth located at The Castle Performing Arts Center, offering scholarship programs for underprivileged youth and victims of trauma and abuse, thanks to a previous small grant from Ecolab. Otherwise TYU has been supported solely by private donors. The scholarships provide Music Therapy, musical instruments, transportation, and field trips for students. Our team also presents character education assemblies to schools in the Stateline area. The curriculum models coping skills, empathy, and self-control through engaging presentations and live music.

The Youth Unite has also provided a filmmaking workshop through the Help Yourself program at Beloit College, hosted family-friendly concerts, Music at Riverside Park, and movie/music nights to provide young musicians a place to perform. We offer recitals and music for community functions including the Beloit Art Center, Nature at the Confluence, Beloit International Film Festival, Downtown Beloit Association events such as Art Walk and the Grand Lighted Parade, counseling, and ukuleles & lessons for Teen Time at the Boys & Girls Clubs and YMCA.

During the pandemic, our team has provided one-on-one counseling online and in person to young people who are

Printed By: Brian Gile on 8/16/2023

12 of 25

struggling with anxiety and depression. The Castle Music School has hosted the sing-along for the Beloit International Film Festival, providing youth a talent platform (all proceeds going to BIFF). TYU also provides virtual music lessons to students in the Philippines through PAMI, and is active with the BJSO (symphony).

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

After attending community input meetings at City Hall and Grinnell Center, our documentation showed the community desires: free family programming, after-school activities, Saturday events for youth, music programs for youth with longevity and sustainability, and pickleball.

The need in the Stateline area for musical/arts programming is great.

According to the National Library of Medicine, music is a method of therapy and means of stimulating cerebral circuits, and there is an association between musical creativity and positive mental health.

<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5618809/>

Among children between the ages of 15 and 19, suicide is the second leading cause of death, and the leading cause of death for 14- to 15-year-olds, according to the Centers for Disease Control and Prevention.

Music leads to change in emotions and stimulates recovery. Data suggests the cost effectiveness of Music Therapy, and it is used to patients with neuropsychiatric disorders.

85% of the brain is developed by age 3. Music teaches language and math skills.

There is a significant portion (17.7%) of Beloit's population living below the poverty line, according to the latest U.S. Census data, and the majority are LMI. <https://www.census.gov/quickfacts/beloitcitywisconsin>

Our program will make sure all economically challenged people will have access to Music Therapy, instruments and programming with consistent teachers and programs with longevity.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

The Youth Unite music programming did expand over the last year to include the Boys and Girls Clubs ukulele lessons and free instruments, which we funded through our grant from Ecolab.

Working with the Merrill Community Center and Hackett neighborhood is a new expansion of this program and a development of several existing others to specifically fit the needs of the demographic.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

It is unique. Our music program offers free Music Therapy to youth who have experienced trauma - that in itself is very unique. The Character Education Assemblies are unique in the schools in that it combines a concert with a message of self-control and metacognition. The services are not being duplicated however we do collaborate with other agencies to ensure that they can offer music programs and to use facilities.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

The Merrill Community Center, Beloit Janesville Symphony Orchestra (BJSO), Beloit International Film Festival (BIFF), Beloit and South Beloit Boys & Girls Clubs, Beloit College, Grinnell Senior Center, Kandu Industries, Nature at the Confluence, Stateline Literacy Council, Families Dealing with Addiction (FDA), Beloit schools, and the Beloit YMCA.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Several methods including email through the Beloit School District, Merrill Center, The Castle, and sharing social media with all the agencies that we work with, listed above. Hopefully a newspaper article and conversations on local radio. Posters throughout the neighborhoods. Our goal is to make sure every resident of the area is informed and has access to Music Therapy. Posters and flyers will be designed for each individual program and event.

We will also host an assembly at the beginning of the school year to make sure every student and their family is informed about our programming.

I. Project Summary

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

Completed by jodywittnebel@gmail.com on 8/15/2023 2:42 PM

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

This particular program is targeted directly to the Merrill and Hackett communities. We expect to serve all of the above within the demographic because we will be right in the neighborhood.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	After-school programming Ukulele classes Purchase ukuleles February concerts and recitals	800	400	\$14,840.00
Q2 4/1/24-6/30/24	After-school programming Ukulele classes Purchase ukuleles Senior citizen/tots music classes Memorial Day parade	800	400	\$2,650.00
Q3 7/1/24-9/30/24	New school year assembly pep fest to promote free programming Music classes Ukulele classes Summer camp	800	400	\$4,175.00
Q4 10/1/24-12/31/24	Music classes Ukulele classes Parent seminar (ECFE) Community music night/recital	800	400	\$2,550.00

	Character education assembly in schools SWAG for students			
				\$24,215.00

I.3. How will you measure the success of the program? (2 points)

General feedback from the community and community leaders. Also by individual lives affected and mostly by the reenrollment of participants and exponential growth of participation each year.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

For individual private lessons, records of attendance and progress along with direct contact with family members and caregivers will be enacted. Group programs and lessons will simply have attendance.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	0	0	0	50	10
31-50% CMI	0	0	0	0	300	100
0-31% CMI	0	0	0	0	450	290

J. Project Budget

Completed by jodywittnebel@gmail.com on 8/15/2023 2:42 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

- 1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
- 2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

- 1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
- 2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Teachers/Instructors wages	\$20,125.00
Quarter 1 - 60 Ukuleles	\$2,400.00
Percussion instruments	\$440.00
Parade supplies	\$200.00

Printed By: Brian Gile on 8/16/2023

17 of 25

Quarter 2 - 10 ukuleles	\$350.00
Quarter 3 - Summer camp supplies	\$500.00
School assemblies SWAG for students	\$200.00
Total	\$24,215.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Johnny Wittnebel	Music Director/Main Teacher	\$9,237.50	0
Zach Douglas	Additional Teacher	\$3,887.50	0
Dr. Rob Tomaro	Additional Teacher/Maestro	\$7,000.00	0

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$0.00	\$0.00	\$24,215.00
Contributions	\$0.00	\$0.00	\$0.00
Foundations & Venture Grants	\$0.00	\$0.00	\$0.00
Special Events	\$0.00	\$0.00	\$0.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$0.00	\$0.00	\$0.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00

Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$0.00	\$0.00	\$24,215.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$0.00	\$0.00	\$20,125.00
Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$0.00	\$0.00	\$0.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$0.00	\$0.00	\$4,090.00
Telephone	\$0.00	\$0.00	\$0.00
Postage	\$0.00	\$0.00	\$0.00

Occupancy (building grounds utilities)	\$0.00	\$0.00	\$0.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$0.00	\$0.00	\$0.00
Mileage for Staff	\$0.00	\$0.00	\$0.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00
Misc. Expenses (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Expenses (Before Depreciation)	\$0.00	\$0.00	\$24,215.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00

Payment to National Organization	\$0.00	\$0.00	\$0.00
----------------------------------	--------	--------	--------

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
-----------------------	--------	---------------------	--

K. Agency Capacity

Completed by jodywittnebel@gmail.com on 8/15/2023 2:42 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

Fifteen years, since 2008.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

We have no experience but we will have two board members experienced with data collection and banking to oversee data submission and collection.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No.

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No we have received no complaints or negative media exposure.

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by jodywittnebel@gmail.com on 8/15/2023 2:42 PM

Case Id: 30194

Name: The Youth Unite - 2024

Address: 501 Prospect Street, Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Betty Peterson, TYU treasurer and Lead Teller at Community Credit Union

Brittnay Alter, Esq., founder of TYU

Jody Wittnebel, TYU president

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Brittnay Alter, Esq. is the unpaid founder of The Youth Unite. She is experienced in legal contracts as well as city and federal government, and worked as the assistant to the Supreme Court Justice of Florida.

Betty Peterson will oversee this particular project. This is new to The Youth Unite, we have never had any federal or city grants.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

We will keep completely separate accounting specially for this project. This will be easy since the only other funding that we expect this year is a small grant from Ecolab, and our private funding. We are a pretty simple operation focusing on music.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

We will provide surveys and count the number of people served at all events.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

It is a question on our survey.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Participants will be from the schools in the direct neighborhoods and it will be in the survey.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30168
Name: ECHO - 2024
Address: 65 South High St., Janesville, WI 53548

Completed by jlocher@echojanesville.org on 6/20/2023 2:28 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name
Everyone Cooperating to Help Others, Inc.

A.2. Organization Address
65 South High St. Janesville, WI 53548

A.3. Phone Number
(608) 754-5333

A.4. Fax Number
(608) 754-9199

A.5. Unique Entity Identifier (UEI) #
DWQXFZ6Y7FN4

A.6. Agency CAGE/SAM #
66GY6

A.7. Executive Director/Chairperson
Jessica Locher

A.8. Email Address
jlocher@echojanesville.org

A.9. Legal Status
Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?
Yes

If yes, for approximately how many years?
5

PROJECT INFORMATION

A.11. Project Name
Emergency Rent Assistance

PRIMARY CONTACT #1

A.12. First Name
Jessica

A.13. Last Name
Locher

A.14. Email Address
jlocher@echojanesville.org

A.15. Phone Number
(608) 754-5333

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name
Joe

A.17. Last Name
Locher

A.18. Email
joelocher@echojanesville.org

A.19. Phone Number
(608) 754-5333

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by jlocher@echojanesville.org on 6/20/2023 10:59 AM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

ECHO will provide rent or security deposit assistance for low-income applicants to prevent eviction or secure permanent housing. ECHO utilizes data and guidance from HUD to determine low-income status which is used for program eligibility.

C. Project Type

Completed by jlocher@echojanesville.org on 6/20/2023 11:01 AM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 26

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

ECHO is requesting funds to provide direct payments of rent or security deposit to landlords/property managers, on behalf of low-income renters, to prevent eviction or end a household's homelessness. ECHO expects to assist about 15 unique households, or about 40 people, within the City of Beloit.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by jlocher@echojanesville.org on 6/20/2023 2:16 PM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

ECHO's Rent Assistance program is a Public Service Program that provides financial assistance to pay rent or security deposit and also comprehensive case management. Case management is provided by the ECHO Client Advocates at the time of the assessment/application appointment. Client Advocates discuss the client's income and expenses as well as other concerns the client may have and provide referrals and other community resources that may benefit the household to avoid evictions. Additional case management is offered during each household's assistance appointment including budgeting, other supportive services available through ECHO or other service providers, and working out payment arrangements with their landlord. ECHO also offers the PATH program that may provided additional, on-going assistance to eligible homeless individuals or families for up to 60 days after housing is secured.

E. Conflict of Interest

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

Completed by jlocher@echojanesville.org on 6/20/2023 11:29 AM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

Completed by jlocher@echojanesville.org on 7/5/2023 1:49 PM

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

BOARD ROSTER 2023.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

589_ECHO - Attach 2 - Articles of Incorp.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

Tax Exempt Status IRS Letter.pdf

WI CES S-211 Form.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Authorization Letter.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to

Printed By: Brian Gile on 8/16/2023

8 of 26

*negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

Authorization Letter.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

ECHO Org Chart - June 2023.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Public Disclosure Copy.pdf

G. Funding Priorities

Completed by jlocher@echojanesville.org on 7/21/2023 7:49 AM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

ECHO's Rent Assistance program is a Public Service Program that provides financial assistance to pay rent or security

Printed By: Brian Gile on 8/16/2023

10 of 26

deposit and also comprehensive case management. Case management is provided by the ECHO client advocate/case manager at the time of the assessment appointment for the assistance. They discuss the client's income and expenses, as well as other concerns the client may have, for which they problem-solve, which may include linking them to other services in the community. In addition to case management taking place during the assistance appointments with a Client Advocate, ECHO also offers clients services through grant-funded programs from SAMSHA and United Way to provide staff to do street outreach, housing search assistance, service navigation, and much more.

H. Agency Summary

Completed by jlocher@echojanesville.org on 7/31/2023 8:17 AM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

ECHO is a service agency operating since 1969, incorporated in 1975, with 501 (c)(3) status in 1977 with a mission of providing services that meet basic human needs.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

ECHO will provide direct payments to landlords or property managers with CDBG funds for rental or security deposit assistance on behalf low-income residents of the City of Beloit. All CDBG funds would be used for direct assistance. The rental assistance program is built to prevent eviction and homelessness. Provided alongside the direct payments to landlords is case management focused on overcoming household barriers, budgeting, and advocacy.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Per the 2021 report, 33% of Rock County lives at or below the ALICE threshold (Asset Limited, Income Constrained, Employed) which indicates households who have earned income but are unable to afford the cost of living in the area in which they live. Of individuals specifically in Beloit, 54% were under the ALICE threshold. According to data from the 2021 U.S. Census, 10% of individuals in the county were under the Federal Poverty Line (17% of individuals in Beloit were under the FPL per 2021 U.S. Census data). Households who are under the ALICE threshold may be just one or two paychecks away from a crisis that could result in homelessness.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

No changes.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

ECHO has been the primary provider of emergency rental assistance in Rock County for several years as the program has expanded. While there are other rental assistance providers within the City of Beloit, most of those providers have been accessible only to certain sub-populations. ECHO's Rental Assistance program is available for anyone to apply should they meet basic eligibility requirements. As this is the case, it is difficult to say that the service is duplicative given the broader scope of ECHO compared to other programs that have provided rental assistance. The need is recognized daily

Printed By: Brian Gile on 8/16/2023

12 of 26

with calls from residents within the City of Beloit in need of assistance. Together with funding that covers the entire county that allow for assistance in the City of Beloit (EFSP, UnitedWay, Donated funds), ECHO seeks to provide the best possible service where people need it most.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

ECHO works closely with area shelters for homeless individuals and families with referrals to Family Promise, House of Mercy, GIFTS Men's Shelter, Family Services, YWCA Rock County, Edgerton Community Outreach, Community Action, Project Treat, Wisconsin Department of Veterans Affairs, The Salvation Army, and many more. ECHO collaborates with many of these agencies in regards to the Emergency Solutions Grant and Homeless Prevention Program funding which ECHO utilizes for Rapid Re-Housing and the State Shelter Subsidy Grant for Emergency Lodging. ECHO coordinates services with other HITF agencies to prevent overlap or duplicate services. As such, ECHO has been considered the primary provider of Emergency Rental Assistance for Rock County.

ECHO is actively involved with the Homeless Intervention Task Force (HITF) and is a founding member. Staff has daily contact with various agencies, schools, local police departments, as well as county and city department staff. ECHO regularly attends all HITF related meetings, including Executive Committee meetings. ECHO currently has staff as HITF Treasurer on the Executive Committee and the Executive Director is on the Board of Directors for the Balance of State, which coordinates funding with agencies within 69 of 72 Wisconsin counties.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

ECHO is a long-time member of the Homeless Intervention Task Force, Rock & Walworth County's Continuum of Care, and regularly updates the membership about availability of programs and services that are being offered. ECHO employs two Housing & Resource Navigators who work with households to connect participants with housing opportunities as well as ECHO's programs and services. We attempt to ensure that information regarding ECHO is available at other partner agencies

I. Project Summary

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

Completed by jlocher@echojanesville.org on 7/24/2023 3:09 PM

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

ECHO's Rental Assistance program does not limit services to any particular sub-population. Because of this, data varies for year to year. In 2022, 60% of households were 0-30% County Median Income, another 24% were in the 31-50% CMI range and 16% were 51-80% CMI. Specifically with CDBG funding in the City of Beloit, 73% of households were 0-30% CM, 7% were 31-50%, and 20% were 51-60% CMI.

Racial demographics in 2022 across all funding: 54% of households identified as White, 29% identified as Black/African American, 4% identified as Black/White, and 3% identified as Asian. 10% of households identified as Other or mixed. About 4% of households identified as Hispanic/Latino. With CDBG funding in the City of Beloit, 28% identified as White, 38% identified as Black/African American, 3% Native American/Alaskan Native, and 31% identified as Other or mixed.

Household demographics in 2022 across all funding: 73% of households had a female head of household, 57% had children, 27% had a disabled household member, and 48% were single parent households. With CDBG funding in the City of Beloit, about 87% of households had a female head of household, 67% had children, 33% had a disabled household member, 53% were single parent households.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00
Q2 4/1/24-6/30/24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00

Q3 7/1/24-9/30/24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00
Q4 10/1/24-12/31/24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00
				\$15,000.00

I.3. How will you measure the success of the program? (2 points)

The goal of the rental assistance program is to prevent eviction and homelessness. The measurement used to determine success with this program is through follow-up calls to the landlord or property managers six months after assistance is provided. ECHO's goal is that at least two-thirds of households will be considered successful. A successful follow-up would mean that a household was in their apartment and current with their rent, are in the apartment and owe a small amount with a payment arrangement, or have moved from the apartment willingly without owing money. Data collected from 2022 shows 81% of households with successful follow-up contacts. Results from 2021 shows successful outcomes to be 83%. These outcome results may have been affected by the existence of WERA funding in the community through April 2023, however, in most years pre-pandemic, the follow-up results typically remained around 70%

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

ECHO offers case management services to anyone who is seeking services. Client Advocates are available to households from the very beginning of the process, starting with the application. Each household spends an average of about two hours with their assigned Client Advocate prior to receiving rental assistance. Households often need assistance beyond the financial component paid to the landlord and will schedule continued appointments with a Client Advocate as needed. If a household is experiencing issues related to mental health, they may be eligible for the PATH program (Projects for Assistance in Transition from Homelessness) regardless of receiving rental assistance or not. The PATH program may assist households with diversion tactics and interventions in addition to connection with local resources such as mental health counseling, medical transit, or SOAR applications for SSI/SSDI. The PATH program is available to households who have the threat of homelessness and may be enrolled for up to 60 days, or until the issue has resolved whether through rental assistance or diversion.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	60	29	37	18	60	30
31-50% CMI	106	43	80	36	120	60

0-31% CMI	249	108	126	56	250	115
--------------	-----	-----	-----	----	-----	-----

J. Project Budget

Completed by jlocher@echojanesville.org on 7/24/2023 2:52 PM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

- 1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
- 2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

- 1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
- 2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Rent Assistance	\$15,000.00
Total	\$15,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual	Total Annual
------	-------	--------------	--------------

		Salary	Benefit Costs
--	--	---------------	----------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$158,429.47	\$63,000.00	\$60,000.00
Contributions	\$587,124.00	\$680,850.00	\$680,850.00
Foundations & Venture Grants	\$67,431.00	\$50,000.00	\$50,000.00
Special Events	\$126,855.00	\$100,000.00	\$100,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00

Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$367,140.60	\$530,600.00	\$530,600.00
Blackhawk Region United Way	\$134,500.00	\$180,000.00	\$180,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$278.00	\$100.00	\$100.00
Misc. Revenue (not otherwise listed)	\$0.00	\$500.00	\$500.00
Total Support and Revenue	\$1,441,758.07	\$1,605,050.00	\$1,602,050.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$477,032.00	\$725,000.00	\$725,000.00
Employee Benefits	\$12,891.00	\$13,000.00	\$13,000.00
Payroll Taxes	\$35,734.00	\$55,463.00	\$55,463.00
Professional Fees	\$25,558.00	\$31,500.00	\$31,500.00
Supplies	\$3,224.00	\$3,000.00	\$3,000.00
Telephone	\$13,841.00	\$20,000.00	\$20,000.00
Postage	\$2,900.00	\$5,000.00	\$5,000.00
Occupancy (building grounds utilities)	\$37,349.00	\$24,287.00	\$24,287.00
Equipment Rental & Maintenance	\$20,172.00	\$25,000.00	\$25,000.00
Printing Art Work Publications	\$966.00	\$2,000.00	\$2,000.00
Mileage for Staff	\$5,142.00	\$6,500.00	\$6,500.00
Conferences Conventions Meetings	\$2,329.00	\$2,500.00	\$2,500.00
Agency Dues	\$1,000.00	\$1,000.00	\$1,000.00
Awards Grants Individual Assistance	\$557,129.00	\$635,000.00	\$635,000.00

Officers & Directors Liability Insurance	\$7,802.00	\$14,000.00	\$14,000.00
Misc. Expenses (not otherwise listed)	\$37,379.00	\$41,200.00	\$41,200.00
Total Expenses (Before Depreciation)	\$1,240,448.00	\$1,604,450.00	\$1,604,450.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$201,270.07	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Emergency Food and Shelter Program	\$66,706.65	29	None

Emergency Solutions Grant	\$43,506.31	22	None
SAMSHA - PATH	\$89,000.00	4	None
HUD - COC YHDP	\$187,444.00	1	None
CDBG - City of Janesville	\$151,992.47	29	None

K. Agency Capacity

Completed by jlocher@echojanesville.org on 7/21/2023 9:27 AM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

ECHO has been providing services regularly in Beloit since 2018. Prior to that, funding for rental assistance was limited to Janesville residents due to capacity. The program has grown over the years to be able to expand to cover all of Rock County.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

ECHO has long history of utilizing state and federal funding to strengthen the rental assistance program. Community Development Block Grant funding has been received for 26 years. Emergency Food and Shelter Program funding has been received for 27 years. Emergency Solutions Grant/Homeless Prevention Program has been received for 13 years. State Shelter Subsidy Grant has been received for 18 years. Safe Shelter and Homelessness Grant funding has been received for 2 years. Projects for Assistance in Transition from Homelessness funding has been received for 4 years. ECHO just recently, in 2022, received Continuum of Care funding to administer a youth rapid re-housing program (YHDP) and provide a Youth Navigator staff position. In 2023, ECHO received additional ARPA funding through Rock County for emergency lodging.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No.

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No.

Citizen Complaints/Negative Media Exposure

***No files uploaded*

Printed By: Brian Gile on 8/16/2023

23 of 26

L. Staffing Capacity

Completed by jlocher@echojanesville.org on 7/24/2023 3:42 PM

Case Id: 30168

Name: ECHO - 2024

Address: 65 South High St., Janesville, WI 53548

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

The Executive Director and Operation Supervisor are responsible for implementation of ECHO's grant awards. The Operation Supervisor is responsible for compliance and reporting, including payment requests.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

ECHO's financial reports are prepared on a cash-flow basis, with accrual adjustments done after the close of our fiscal year (calendar year). ECHO has a Main checking account, as well as a Savings account that is accessed for cash flow. Summit Accounting prepares the payroll and payroll taxes, monthly financial reports and journal entries using QuickBooks. We have Representative Payee checking accounts for people with disabilities who cannot handle their own funds. The Executive Director issues account payables twice a month from the Main checking account with approval from the Board Treasurer, with forms indicating the code of accounts. The Executive Director also issue checks for rent and lodging payment on a weekly basis. The Housing and Homeless Supervisor performs that duty if the Executive Director is absent.

ECHO Executive Committee and Board receive monthly financial reports. The Executive Director updates them at any point-in-time about the status of funds. Auditors review our grant contracts, reports and reimbursements. We have not had any significant audit deficiencies.

The final audited 2022 financial statements are not ready at this time and are expected to be complete by September 2023. As soon as the audited financial statements are ready, they may be sent. ECHO has received a letter annually from Charity Navigator for six consecutive years, congratulating us on earning the coveted 4-Star Rating from Charity Navigator, because of having sound fiscal management and a commitment to accountability and transparency. Charity Navigator is America's largest independent charity evaluator. Using objective, data-driven analysis, Charity Navigator awards only the most fiscally responsible organizations a 4-star rating.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

ECHO uses Quickbooks for all fiscal accounting. All grant funding spent is put into an account class for reporting purposes. ECHO also uses other excel workbooks to track expenses to ensure expenses and revenue are correct. ECHO is also audited on an annual basis.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

ECHO collects income documentation for earned income, child support, social security, SSI/SSDI benefits, unemployment, rental subsidies, W2, self-employment, and any other money coming into the household. County Median Income is figured based on a calculation of the past six months of income and projecting the next six months.

Other relevant data (demographics, veteran status, disability, etc.) is tracked in Clarity Human Services, Wisconsin's Homeless Management Information System (HMIS).

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Wisconsin Identification Cards/Driver's License and Social Security documentation is requested of all rental assistance applicants. Copies of filed tax returns may also be accepted if presented with Social Security numbers.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Staff refers to the Assessor data and Rock County property tax records as well as matching the address on a map.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30188
Name: Family Services of S. WI & N. IL, Inc./ Defy
Address: 416 College St., Beloit, WI 53511

Completed by khood@familyservices1.org on 7/3/2023 2:10 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Family Services of S. WI & N. IL, Inc./ Defy Domestic Abuse
Beloit

A.2. Organization Address

416 College St. Beloit, WI 53511

A.3. Phone Number

(608) 364-1083

A.4. Fax Number

(608) 365-4097

A.5. Unique Entity Identifier (UEI) #

M349KCHGLGD7

A.6. Agency CAGE/SAM #

4P1F9

A.7. Executive Director/Chairperson

John Pfeleiderer

A.8. Email Address

jpfeleiderer@familyservices1.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

19

PROJECT INFORMATION

A.11. Project Name

Case Management for homeless Survivors of Domestic
Violence

PRIMARY CONTACT #1

A.12. First Name

Kelsey

A.13. Last Name

Hood-Christenson

A.14. Email Address

khood@familyservices1.org

A.15. Phone Number

(608) 365-1244

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Paula

A.17. Last Name

Vestin

A.18. Email

pvestin@sarpwi.com

A.19. Phone Number

(608) 365-1244

Printed By: Megan McBride on 8/17/2023

B. National Objectives

Completed by khoo@familyservices1.org on 7/3/2023 2:12 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

The target population of this project is homeless survivors of domestic violence. This project is specifically designed to provide case management services to homeless survivors residing at the program's emergency shelter

C. Project Type

Completed by khoo@familyservices1.org on 7/3/2023 2:14 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Megan McBride on 8/17/2023

4 of 33

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

The proposed project will provide case management services to homeless survivors of domestic violence ("battered and abused spouses") residing in the program's emergency shelter. The program also provides mental health therapy to survivors free-of-charge which is accessed by connection through the program's case managers; this project will facilitate connection for homeless survivors to mental health therapy.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

N/A

D. Consolidated Plan Goal

Completed by khoo@familyservices1.org on 7/3/2023 2:17 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

This project will provide case management services to homeless survivors of domestic violence residing in the program's emergency shelter. Case management services will include risk assessment, safety planning, service plan development, life skills development, systems navigation, and other services focused on developing sustainable levels of self-sufficiency. Case managers will work with each survivor to development a personal service plan with self-identified goals in which case managers will support the survivor in reaching.

E. Conflict of Interest

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

Completed by khood@familyservices1.org on 7/3/2023 2:17 PM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by khoo@familyservices1.org on 7/6/2023 5:27 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

2023 board roster -- by term expiration.docx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles of Incorporation Program 11105.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

Tax Exempt Certificate 2021 (new number) (1).pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

2023 22 June Board Meeting Minutes-draft (jmp tweaked).doc

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Megan McBride on 8/17/2023

8 of 33

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required*

authorized signatory letter.docx

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required*

Family Services Organizational Chart.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Audit Draft.pdf

Optional: NRSA Activity Qualifier

Completed by khoo@familyservices1.org on 7/6/2023 5:33 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

This project will connect homeless survivors of domestic violence currently residing in the program's emergency shelter to existing financial and supportive resources that would assist them in reaching their self-identified goals. The project will also provide support, information, and resources to reduce re-entry into and/or future homelessness while promoting stability thus long-term residents

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

No

If the agency is not located within the Merrill or Hackett neighborhoods, please thoroughly explain how services are being delivered directly to residents of the NRSA neighborhoods.

While the project does not consider these neighborhoods the "target population", services through this project are designed to serve resource-limited families to address basic needs crisis. As these neighborhoods have been identified as significantly resource-limited, the availability of this project within the city of Beloit will offer another resource to help stabilize families in these neighborhoods.

Printed By: Megan McBride on 8/17/2023

10 of 33

Optional: CBDO Qualifier

Completed by khood@familyservices1.org on 7/6/2023 5:37 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

Yes

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

Family Services mission is to restore, sustain, and enhance the lives of our community by providing an array of empowering services that focus on prevention, advocacy, case management, counseling, and therapy.



Supporting Documentation (if applicable)

Articles of Incorporation Program 11105.pdf

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

No

5. Does your governing body's membership consist of at least 51% or more of the following:

- low-moderate income residents, owners or
- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

*See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.

No

Printed By: Megan McBride on 8/17/2023

12 of 33

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5
***No files uploaded*

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?
No

7. Does your agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?
No

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?
Yes

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?
No

10. Is your agency free to contract for goods and services from vendors of its own choosing?
Yes



If you answer “No” to any of the above questions, please submit your agency’s charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation

By-Laws

By-laws 2023.doc

Admin Determination

Completed by gileb@beloitwi.gov on 7/7/2023 10:19 AM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

Admin Determination

Please review the pre-application in its entirety. If the applicant is **APPROVED** to apply, please complete the attestation and sign below, then select **COMPLETE & CONTINUE**. If the applicant is **NOT APPROVED** to apply, please select **SAVE**, update the case status and notify the applicant.

Does the agency qualify as a CDBO?

No

Does the agency aticity qualify under the NRSA category?

No

Notes

I attest that I have reviewed all pre-application materials, and that the applicant is eligible to apply for Community Development Block Grant (CDBG) funding.

Signature

Brian Gile

Electronically signed by gileb@beloitwi.gov on 7/7/2023 10:19 AM

Legal Status Determination

Completed by khood@familyservices1.org on 7/26/2023 5:12 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

Legal Status Determination

Please provide the following information.

1. Please select your legal status

Private, Non-Profit

Please click **Complete and Continue** to continue with your application.

G. Funding Priorities

Completed by khooood@familyservices1.org on 7/26/2023 5:14 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The case management services focus on developing sustainable levels self-sufficiency. This entails a client accessing

stable housing supported through employment/income, which tends to result in longer-term residency in neighborhoods. An important element of case management is the “warm” referral process: that is, persistent case management efforts to ensure the client is successful in accessing other beneficial resources such as housing assistance, financial coaching, and mental health therapy.

H. Agency Summary

Completed by khooood@familyservices1.org on 7/26/2023 5:48 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Family Services of S. WI & N. IL, Inc. is a non-profit social service agency that began serving vulnerable families in Beloit in 1935. In 2003, Family Services adopted a community-based advocacy program for survivors of domestic violence, Defy Domestic Abuse Beloit. Defy's mission is to champion the inherent dignity of each individual while interrupting and dismantling systemic cycles of abuse.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

The funding requested through this proposal is to support personnel costs associated with providing case management and advocacy services to unhoused survivors of domestic violence residing within the program's emergency shelter. These services will include comprehensive safety planning, service plan creation, information, "warm" referrals to other essential services, system navigation, and emotional support as survivors work to rebuild their life after fleeing abuse.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Services and resources addressing the needs of unhoused families are essential to any agency serving survivors of domestic violence. The National Network to End Domestic Violence reports that domestic violence is a leading cause of homelessness for women and their children with 22%-57% of homeless women reporting domestic violence being the immediate cause of their homelessness. Domestic Violence and homelessness are linked for a variety of reasons including that a domestic violence offender may sabotage a victim's financial independence to prevent them from leaving the abusive relationship; domestic violence within a household can also cause a landlord to evict a family from their housing. Identifying as a survivor may also extend the length of time someone experiences homelessness as someone may be denied housing due to this status; a national survey found that 65% of test applicants applying for housing on behalf of survivors were denied housing or offered less favorable housing than non-survivors. This is true for Rock County as the WI Balance of State Continuum of Care reported in May 2023 that there were more domestic violence survivors than any other vulnerable population homeless and waiting for services on the Rock/ Walworth Co coordinated entry waitlist.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Unfortunately Defy has not been able to expand our capacity to provide emergency shelter to survivors with associated case management. The program has worked to expand our services that address housing needs for survivors through

Printed By: Megan McBride on 8/17/2023

18 of 33

the addition of a Rapid Rehousing Program but the funding for this program requires Defy to enroll survivors into this program from the coordinated entry list, which may result in survivors not currently residing in Defy's emergency shelter enrolled before our shelter residents. Defy has worked to increase services offered on-site at our emergency shelter through the renovation of our "donation room" into three additional offices, which has relocated our Family and Youth Advocate and Bilingual Advocate from our College St. building back to Defy's emergency shelter location. This will ensure these services are more accessible to shelter residents during their stay as unhoused survivors are more likely to also experience barriers to transportation

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

Defy is the only program in the City of Beloit with services specifically for the unique, varied, and typically complex needs of victims of domestic violence. There are currently two other homeless shelters, Family Promise of Greater Beloit (formerly Hands of Faith) and Sparrow's Nest; our program differs from these in that our program has an increased focus on safety, case management and trauma-informed care. Our program also has an increased ability to continue services to clients that have exited shelter in comparison to the city's homeless shelters. In addition, the program is able to facilitate access (through other Family Service programs) to mental health counseling and sexual assault-specific programming. Defy is also the only service in the City of Beloit serving the homeless and housing insecure with increased attention to the multiple intersections of needs specific to survivors of domestic violence including legal advocacy, 24-hour crisis line, support groups, and personal advocacy. It should be noted that program services are driven through strong professional social work practice standards. As Defy's emergency shelter is often at capacity, we collaborate frequently with these other programs to house survivors that we are unable to house. Defy will also have advocate respond to survivors residing in other shelters to provide advocacy and address the needs specific to domestic violence survivors that our advocates are trained and experienced in providing.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

One collaborative partner of Defy is the City of Beloit Police Department to implement the Lethality Assessment Program, a screening tool to connect high-risk survivors to an advocate immediately for safety planning and ongoing services. Defy also works with several local youth service providers to provide prevention services. Another collaborative partner of Defy's is Rock County CPS through the Domestic Violence CPS Leadership Team. This team has succeeded in increasing communication between the agencies for improved services to survivors and has maintained accountability for this work through a MOU and yearly accountability timeline. Defy also collaborates with state and local service providers for services and education for the LGBTQ+ community including Janesville Mobilizing 4 Change, Yellow Brick Road, Forge, Diverse and Resilient, several county school districts, and Janesville PRIDE. Defy also works Rock County jail to provide advocacy to incarcerated survivors. Defy also collaborates with the Humane Society of S. WI to provide temporary fostering for pets of survivors of domestic violence. Defy also works very closely with local homeless service providers as Defy is very active in the Homeless Intervention Task Force and the Beloit Area Task Force on Homelessness.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Defy is very active in multiple community events to ensure community members are well informed of the services available to them, including Defy's emergency shelter. Defy seeks events targeting historically marginalized and vulnerable communities, including outreach to Beloit's LMI neighborhoods. For example, Family Services recently hosted Festival of Colors in Summit Park with Defy's information present to reach these residents. Defy also works to ensure service providers in these neighborhoods are prepared with program materials and know how to reach our program if

they encounter someone that could benefit from our services. Defy also keeps information update on the agency's website and with 211 for additional access to our services.

I. Project Summary

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

Completed by khooood@familyservices1.org on 8/17/2023 2:25 PM

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

Defy provides services to any individual that self-identifies as a survivor of domestic violence that continues to be negatively impacted by trauma regardless of gender, age, time since the last incident, background, identity, or any other factor. This project will focus on survivors that are experiencing homelessness or housing insecurity, but these survivors can be of any community or population.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	- Approximately 10 households will begin receiving services focused on housing, stability of progress, and mental health. - 100% of survivors provided services will begin receiving case management services that will include the completion of a comprehensive risk assessment and service plan - Outcomes will be reviewed by the program director	23	10	\$2,500.00
Q2 4/1/24-6/30/24	- Approximately 6 additional households and 4 ongoing households will begin receiving services	23	10	\$2,500.00

	<p>focused on housing, stability of progress, and mental health.</p> <ul style="list-style-type: none"> - 100% of survivors provided services will begin receiving case management services that will include the completion of a comprehensive risk assessment and service plan - Outcomes will be reviewed by the program director 			
Q3 7/1/24-9/30/24	<ul style="list-style-type: none"> - Approximately 6 additional households and 4 ongoing households will begin receiving services focused on housing, stability of progress, and mental health. - 100% of survivors provided services will begin receiving case management services that will include the completion of a comprehensive risk assessment and service plan - Outcomes will be reviewed by the program director 	23	10	\$2,500.00
Q4 10/1/24-12/31/24	<ul style="list-style-type: none"> - Approximately 6 additional households and 4 ongoing households will begin receiving services focused on housing, stability of progress, and mental health. - 100% of survivors provided services will begin receiving case management services that will include the completion of a comprehensive risk assessment and service plan 	23	10	\$2,500.00

	- Outcomes will be reviewed by the program director			
				\$10,000.00

I.3. How will you measure the success of the program? (2 points)

Defy strives to empower survivors by assisting them to achieve their self-sufficiency goals and reduce life stressors, all of which must also include an emphasis on increasing the survivor’s safety. While a focus on life stressors and self-sufficiency may seem vague, this is intentional as Defy understands the goals of each survivor are different so the services provided and outcomes of services will also be different and individual to each survivor. To measure the outcomes of services, Defy will use three scales provided upon entry into services, regularly throughout services, and upon exit from services; the Life Stress Assessment, Measure of Victim Empowerment- Related Safety, and Self-Sufficiency Scale. These outcomes will have a positive impact not only on the survivor but on the community as a whole because survivors with increased empowerment related safety and decreased life stressors will be able to focus on increasing their self-sufficiency; this will then allow the survivor to live independently of the perpetrator or other community assistance to sustain themselves and their family. These survivors will be able to engage and contribute to the community in a positive manner when they feel they are safe, empowered, and alleviated of multiple life stressors related to trauma. Through this project, Defy would like to see a 75% decrease in life stressors reported by survivors upon entry into services when compared to exit from services. Focused on self-sufficiency for homeless survivors of domestic violence, Defy also strives with this project to see a 65% increase in housing self-sufficiency. Defy would also like to see an increase in empowerment-related safety through this project

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

All participants are introduced to an advocate and offered case management services upon intake into the program; identifying a single advocate is not to limit access for the survivor but rather increase the level of comfort the survivor has with these services as they can build rapport and trust with this individual. The survivors is also welcome to work with any other advocate at any time but a single advocate will have the responsibility of ensure completion of required documents for the client's file and general oversight of the survivor's involvement with the program. The case managers’ offices are on the same property as the emergency shelter facility, allowing for easy access by residential clients for scheduled and spontaneous case management meetings as needed. In general, these meetings are convened weekly for the purpose of reviewing progress made and modifying the case plan’s tasks, goals, responsibilities, and time frames as needed.

For survivors that have exited the emergency shelter or survivors receiving services outside of emergency shelter, case management services can also be accessed as needed. These survivors may come to the program facilities for appointment times or work with a case manager through another form of communication (e.g. - e-mail or by phone) if unable to come to the program facilities. Many former residents that have left emergency shelter have become accustomed to 24-hour supportive services and may call or arrive at Defy outside of their appointments or typical business hours; this is understandable, and shelter advocates are trained to meet with these survivors or talk to them with our 24/7 hotline to meet any needs they may have.

For survivors consistently unable to come to the program facilities due to transportation difficulties or other concerns, a case manager can meet with the survivor at another community facility or in another more convenient location for the survivor after reviewing and addressing any potential safety concerns for the program staff; Defy’s system navigator can also provide transportation to the survivor to and from Defy’s facilities or to other goal-focused

appointments while also providing advocacy and accompaniment.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	0	0	0	0	0
31-50% CMI	0	0	2	2	2	2
0-31% CMI	70	36	57	27	86	47

J. Project Budget

Completed by khood@familyservices1.org on 7/26/2023 7:00 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients
Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Wages/ Salaries	\$10,000.00
Total	\$10,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Mandy Chitwood	Domestic Violence Services Coordinator	\$56,550.00	11875.5
Angela Luton	Domestic Violence Survivor Advocate	\$44,850.00	8970
Takesha Johnson	Domestic Violence Survivor Advocate	\$44,850.00	10315.5

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$10,000.00	\$9,750.00	\$10,000.00

Contributions	\$41,531.74	\$57,000.00	\$40,000.00
Foundations & Venture Grants	\$13,421.71	\$4,000.00	\$10,000.00
Special Events	\$16,819.00	\$17,000.00	\$20,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$746,160.63	\$970,891.00	\$970,891.00
Blackhawk Region United Way	\$50,004.00	\$50,000.00	\$50,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00

Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$2,979.38	\$3,000.00	\$3,000.00
Total Support and Revenue	\$880,916.46	\$1,111,641.00	\$1,103,891.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$580,637.26	\$569,171.00	\$580,554.00
Employee Benefits	\$84,318.23	\$89,338.00	\$91,124.00
Payroll Taxes	\$47,279.00	\$50,780.00	\$51,795.00
Professional Fees	\$25,469.67	\$30,000.00	\$30,000.00
Supplies	\$19,118.01	\$24,009.00	\$20,000.00
Telephone	\$3,799.38	\$3,000.00	\$3,000.00
Postage	\$184.61	\$150.00	\$150.00
Occupancy (building grounds utilities)	\$25,649.65	\$76,695.00	\$50,000.00
Equipment Rental & Maintenance	\$1,960.78	\$1,526.00	\$1,526.00
Printing Art Work Publications	\$8,733.05	\$4,640.00	\$4,500.00

Mileage for Staff	\$2,016.34	\$4,000.00	\$4,000.00
Conferences Conventions Meetings	\$1,261.77	\$2,000.00	\$2,000.00
Agency Dues	\$867.74	\$1,000.00	\$1,000.00
Awards Grants Individual Assistance	\$69,616.83	\$242,000.00	\$242,000.00
Officers & Directors Liability Insurance	\$3,314.23	\$4,158.00	\$4,158.00
Misc. Expenses (not otherwise listed)	\$17,977.78	\$20,556.00	\$21,000.00
Total Expenses (Before Depreciation)	\$892,204.33	\$1,123,023.00	\$1,106,807.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	(\$11,288.00)	(\$7,932.00)	(\$2,910.00)
Depreciation	\$18,000.00	\$18,000.00	\$18,000.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Victim of Crime Act	\$451,007.00	6	N/A
EHH	\$23,980.00	17	N/A
WIBOSCOG DV RRH	\$301,317.00	1	N/A

K. Agency Capacity

Completed by khoo@familyservices1.org on 8/1/2023 12:33 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

20

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

The program has over 17 years in managing federal grants including EHH (HUD), VOCA, and now WIBOSCOC DV Rapid Rehousing Funds (HUD).

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

Defy was required to reimburse CDBG grant funds in 2019 and 2020 due to the use of personnel funds for training to provide direct service. The agency reimbursed the City of Beloit

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by khooood@familyservices1.org on 8/1/2023 12:54 PM

Case Id: 30188

Name: Family Services of S. WI & N. IL, Inc./ Defy

Address: 416 College St., Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Ms. Angela Luton has been a Domestic Violence Survivor Advocate with the program since November 2022. She has previously worked as a paralegal and brings legal navigation experience to her work with survivors. Ms. Takesha Johnson has been a Domestic Violence Survivor Advocate with the program since October 2022 but started her service to survivors of domestic violence as a Shelter Advocate with Defy in December 2019. Both Ms. Luton and Ms. Johnson will be responsible under this project for providing direct services to unhoused survivors of domestic violence residing at the program's emergency shelter; these services include case management, personal advocacy, legal advocacy, support groups, systems navigation, and referrals to other services.

Ms. Mandy Chitwood has been an advocate with Defy since November 2018 and currently serves as the Domestic Violence Services Coordinator. In this role and through this project, Ms. Chitwood will provide direct services to unhoused survivors of domestic violence residing at the program's emergency shelter as she is responsible for the direct supervision and guidance of the services Ms. Luton and Ms. Johnson provide.

Mrs. Paula Vestin will begin as the Director of Survivor Empowerment Services in October 2023 overseeing Defy Domestic Abuse Beloit and the Sexual Assault Recovery Program, both programs of Family Services. Mrs. Vestin began with Family Services as a Rural Outreach Advocate with the Sexual Assault Recovery Program in October 2018 then moved into the Sexual Assault Services Coordinator of Green County in August 2020. She will be responsible for the general oversight of all programming and advocates under Defy and SARP. Through this project, she is responsible for grant reporting and management as well as supervision and guidance of Ms. Chitwood and Ms. Chitwood's supervision and guidance of the direct services Ms. Luton and Ms. Johnson provide to unhoused survivors of domestic violence residing at the program's emergency shelter.

Mrs. Kelsey Hood-Christenson will begin as the agency's Executive Director in October 2023. Ms. Hood-Christenson has served in various roles throughout Defy, SARP, and Family Services' therapy program since June 2012. She most recently served as the Director of Survivor Empowerment Services overseeing Defy and SARP and has managed reporting and supervision for CDBG and other grants funds since 2016. Through this project, she will provide supervision and guidance to Mrs. Vestin regarding her responsibilities.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

The agency uses the software Quickbooks Pro. Ms. Cindy Pingel, the Accounts Manager, has been responsible for the

Printed By: Megan McBride on 8/17/2023

32 of 33

fiscal management of the agency since July of 2001. The agency segregates duties as much as is feasible for an agency of its size, utilizes an external audit process and otherwise complies with Federal fiscal policies.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

We use a modified accrual accounting system. CDBG revenues and expenses are tracked through a Chart of Accounts which segregates Community Development Block Grant funds and requires that all expenses incurred for reimbursement from CDBG funds be eligible and authorized by at the staff responsible for the expenditure, the Accounts Manager, and the Executive Director.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

We will continue the policy of recording income levels during the intake into services process. This information will be stored on a database program used by us (and by other domestic violence service providers throughout the state of WI) to store all client records. Income of all clients can be compiled and reviewed through this database as well. Any changes to the client's level of income will be updated as the client's service plan is updated.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Upon intake to Defy services, all survivors are asked about their U.S. legal status. This information is self-reported by survivors. Please note that as a provider of services to "battered women" and victims of crime, we are restricted by statutes (Family Violence Prevention and Services Act and the Victims of Crime Act) from requiring verification of US legal status as a condition of service. It is our understanding that this exemption supersedes the HUD program requirement

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Upon intake into our services, all survivors are asked about their previous permanent address, including the city of that address. Information is self-reported by survivors. We do occasionally serve survivors from outside of the Beloit city limits as relocation to another city is often an important element of a personalized safety plan for survivors. Many survivors are unable to remain in their hometown as perpetrators are often increasingly violent and stalk victims after leaving the abusive relationship. On behalf our local clients deemed unsafe from further harm in Beloit, we maintain relationships with surrounding domestic violence service providers so relocation can occur smoothly. (Just as we may provide services to survivors from other locations through referral from another service provider, Defy also regularly refers survivors from the City of Beloit to surrounding domestic violence service providers because it has been assessed that remaining within the city limits poses a significant risk to the survivor.)

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30190
Name: ECHO - NRSA - 2024
Address: 65 South High St., Janesville, WI 53548

Completed by jlocher@echojanesville.org on 7/5/2023 1:56 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name
Everyone Cooperating to Help Others, Inc.

A.2. Organization Address
65 South High St. Janesville, WI 53548

A.3. Phone Number
(608) 754-5333

A.4. Fax Number
(608) 754-9199

A.5. Unique Entity Identifier (UEI) #
DWQXFZ6Y7FN4

A.6. Agency CAGE/SAM #
66GY6

A.7. Executive Director/Chairperson
Jessica Locher

A.8. Email Address
jlocher@echojanesville.org

A.9. Legal Status
Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?
Yes

If yes, for approximately how many years?
5

PROJECT INFORMATION

A.11. Project Name
Emergency Rent Assistance - NRSA

PRIMARY CONTACT #1

A.12. First Name
Jessica

A.13. Last Name
Locher

A.14. Email Address
jlocher@echojanesville.org

A.15. Phone Number
(608) 754-5333

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name
Joe

A.17. Last Name
Locher

A.18. Email
joelocher@echojanesville.org

A.19. Phone Number
(608) 754-5333

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by jlocher@echojanesville.org on 7/5/2023 1:59 PM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

ECHO has successfully operated a Beloit specific, city-wide Eviction Prevention, CDBG funded program, for five years. CDBG funding for the Merrill and Hackett neighborhoods will allow ECHO to assist individuals/families/households with not only eviction prevention, but also one time or short term (no more than three months) emergency assistance, such as utility payments to prevent cutoff of service, and security deposits. Beneficiaries will be required to live in the designated NRSA neighborhoods as defined by the City of Beloit. These neighborhoods are eligible NRSAs due to the low- and moderate-income area status.

C. Project Type

Completed by jlocher@echojanesville.org on 7/5/2023 2:00 PM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 30

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

ECHO is requesting funds to provide direct payments of rent, security deposit, or utility assistance to landlords/property managers, on behalf of low-income renters in the Merrill and Hackett neighborhoods, to increase housing stability or end a household's homelessness.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by jlocher@echojanesville.org on 7/5/2023 2:00 PM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

ECHO's Rent Assistance program is a Public Service Program that provides financial assistance to pay rent or security deposit and also comprehensive case management. Case management is provided by the ECHO Client Advocates at the time of the assessment/application appointment. Client Advocates discuss the client's income and expenses as well as other concerns the client may have and provide referrals and other community resources that may benefit the household to avoid evictions. Additional case management is offered during each household's assistance appointment including budgeting, other supportive services available through ECHO or other service providers, and working out payment arrangements with their landlord. ECHO also offers the PATH program that may provided additional, on-going assistance to eligible homeless individuals or families for up to 60 days after housing is secured.

E. Conflict of Interest

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

Completed by jlocher@echojanesville.org on 7/5/2023 2:00 PM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by jlocher@echojanesville.org on 7/5/2023 2:02 PM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

BOARD ROSTER 2023.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

589_ECHO - Attach 2 - Articles of Incorp.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

Tax Exempt Status IRS Letter.pdf

WI CES S-211 Form.pdf

Authorization to Request Funds – Include only one copy

*Documentation must be submitted of the governing body's authorization to submit the funding request. Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Authorization Letter.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to

Printed By: Brian Gile on 8/16/2023

8 of 30

*negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

Authorization Letter.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

ECHO Org Chart - June 2023.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Public Disclosure Copy.pdf

Optional: NRSA Activity Qualifier

Completed by jlocher@echojanesville.org on 7/6/2023 2:04 PM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

ECHO's project will provide emergency rental assistance or security deposit to low-income households in the NRSA communities to prevent homelessness and increase household stability in the area. In addition, program participants work with a Client Advocate to be connected with local resources such as food pantries, work programs, and AODA counseling as needed as well as mainstream benefits (FoodShare, Medicaid, etc.).

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

No

If the agency is not located within the Merrill or Hackett neighborhoods, please thoroughly explain how services are being delivered directly to residents of the NRSA neighborhoods.

ECHO is located in Janesville, WI. ECHO's rental assistance application can be found on and submitted directly through the agency website. ECHO is open to walk-in applications during business hours or a paper application may be mailed if needed. Most assistance appointments are scheduled in-person but accommodations can be made for those households that lack transportation by completing appointments over the phone or in Beloit, typically at an office space made

Printed By: Brian Gile on 8/16/2023

10 of 30

available by Community Action.

Optional: CBDO Qualifier

Completed by jlocher@echojanesville.org on 7/7/2023 9:50 AM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

No

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

ECHO's mission is dedicated to meeting housing, food and other basic human needs and addressing the barriers to self-sufficiency. ECHO began as a food pantry and clothing pantry back in 1969 and has continued to grow to meet the needs in the community over the last 54 years by developing housing programs such as emergency rental assistance, emergency lodging, rapid re-housing, and transitional living program. Additionally, ECHO provides over 25 other supportive services such as transportation, personal care items, and holiday programs. As affordable housing availability in our community is critically low, ECHO has been seeking options for additional transitional housing units by partnering with Wisconsin Partnership for Housing Development to build six more units and the City of Janesville to potentially acquire additional homes to renovate. ECHO will continue to investigate ways to expand this program into the future to bring more affordable, supportive housing to Rock County.



Supporting Documentation (if applicable)

BYLAWS - Current - adopted 1-23-17.pdf

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

No

5. Does your governing body's membership consist of at least 51% or more of the following:

Printed By: Brian Gile on 8/16/2023

12 of 30

- low-moderate income residents, owners or
- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

*See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.

No

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5

**No files uploaded

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?

No

7. Does your agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?

No

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?

No

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?

No

10. Is your agency free to contract for goods and services from vendors of its own choosing?

Yes



If you answer “No” to any of the above questions, please submit your agency’s charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation

By-Laws

BYLAWS - Current - adopted 1-23-17.pdf

G. Funding Priorities

Completed by jlocher@echojanesville.org on 7/31/2023 8:21 AM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

ECHO's Rent Assistance program is a Public Service Program that provides financial assistance to pay rent or security

deposit and also comprehensive case management. Case management is provided by the ECHO client advocate/case manager at the time of the assessment appointment for the assistance. They discuss the client's income and expenses, as well as other concerns the client may have, for which they problem-solve, which may include linking them to other services in the community. In addition to case management taking place during the assistance appointments with a Client Advocate, ECHO also offers clients services through grant-funded programs from SAMSHA and United Way to provide staff to do street outreach, housing search assistance, service navigation, and much more.

H. Agency Summary

Completed by jlocher@echojanesville.org on 7/31/2023 8:56 AM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

ECHO is a service agency operating since 1969, incorporated in 1975, with 501 (c)(3) status in 1977 with a mission of providing services that meet basic human needs.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

ECHO will provide direct payments to landlords or property managers with CDBG funds for rental or security deposit assistance on behalf low-income residents of the NRSA (Neighborhood Revitalization Strategy Area) designated areas of the City of Beloit. All CDBG funds would be used for direct assistance. The rental assistance program is built to prevent eviction and homelessness. Provided alongside the direct payments to landlords is case management focused on overcoming household barriers, budgeting, and advocacy.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Per the 2021 report, 33% of Rock County lives at or below the ALICE threshold (Asset Limited, Income Constrained, Employed) which indicates households who have earned income but are unable to afford the cost of living in the area in which they live. Of individuals specifically in Beloit, 54% were under the ALICE threshold. According to data from the 2021 U.S. Census, 10% of individuals in the county were under the Federal Poverty Line (17% of individuals in Beloit were under the FPL per 2021 U.S. Census data). Households who are under the ALICE threshold may be just one or two paychecks away from a crisis that could result in homelessness.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

No Changes

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

ECHO has been the primary provider of emergency rental assistance in Rock County for several years as the program has expanded. While there are other rental assistance providers within the City of Beloit, most of those providers have been accessible only to certain sub-populations. ECHO's Rental Assistance program is available for anyone to apply should they meet basic eligibility requirements. As this is the case, it is difficult to say that the service is duplicative given the

Printed By: Brian Gile on 8/16/2023

16 of 30

broader scope of ECHO compared to other programs that have provided rental assistance. The need is recognized daily with calls from residents within the City of Beloit in need of assistance. Together with funding that covers the entire county that allow for assistance in the City of Beloit (EFSP, UnitedWay, Donated funds), ECHO seeks to provide the best possible service where people need it most.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

ECHO works closely with area shelters for homeless individuals and families with referrals to Family Promise, House of Mercy, GIFTS Men's Shelter, Family Services, YWCA Rock County, Edgerton Community Outreach, Community Action, Project Treat, Wisconsin Department of Veterans Affairs, The Salvation Army, and many more. ECHO collaborates with many of these agencies in regards to the Emergency Solutions Grant and Homeless Prevention Program funding which ECHO utilizes for Rapid Re-Housing and the State Shelter Subsidy Grant for Emergency Lodging. ECHO coordinates services with other HITF agencies to prevent overlap or duplicate services. As such, ECHO has been considered the primary provider of Emergency Rental Assistance for Rock County.

ECHO is actively involved with the Homeless Intervention Task Force (HITF) and is a founding member. Staff has daily contact with various agencies, schools, local police departments, as well as county and city department staff. ECHO regularly attends all HITF related meetings, including Executive Committee meetings. ECHO currently has staff as HITF Treasurer on the Executive Committee and the Executive Director is on the Board of Directors for the Balance of State, which coordinates funding with agencies within 69 of 72 Wisconsin counties.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

ECHO is a long-time member of the Homeless Intervention Task Force, Rock & Walworth County's Continuum of Care, and regularly updates the membership about availability of programs and services that are being offered. ECHO employs two Housing & Resource Navigators who work with households to connect participants with housing opportunities as well as ECHO's programs and services. We attempt to ensure that information regarding ECHO is available at other partner agencies.

I. Project Summary

Completed by jlocher@echojanesville.org on 7/31/2023 11:16 AM

Case Id: 30190
Name: ECHO - NRSA - 2024
Address: 65 South High St., Janesville, WI 53548

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

ECHO's Rental Assistance program does not limit services to any particular sub-population. Because of this, data varies for year to year. In 2022, 60% of households were 0-30% County Median Income, another 24% were in the 31-50% CMI range and 16% were 51-80% CMI. Specifically with CDBG funding in the City of Beloit, 73% of households were 0-30% CM, 7% were 31-50%, and 20% were 51-60% CMI.

Racial demographics in 2022 across all funding: 54% of households identified as White, 29% identified as Black/African American, 4% identified as Black/White, and 3% identified as Asian. 10% of households identified as Other or mixed. About 4% of households identified as Hispanic/Latino. With CDBG funding in the City of Beloit, 28% identified as White, 38% identified as Black/African American, 3% Native American/Alaskan Native, and 31% identified as Other or mixed.

Household demographics in 2022 across all funding: 73% of households had a female head of household, 57% had children, 27% had a disabled household member, and 48% were single parent households. With CDBG funding in the City of Beloit, about 87% of households had a female head of household, 67% had children, 33% had a disabled household member, 53% were single parent households.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00
Q2 4/1/24-6/30/24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00

Q3 7/1/24-9/30/24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00
Q4 10/1/24-12/31/24	Approximately 4 HHs will have affordable and decent housing through the provision of 1-2 month's rent or security deposit.	10	4	\$3,750.00
				\$15,000.00

I.3. How will you measure the success of the program? (2 points)

The goal of the rental assistance program is to prevent eviction and homelessness. The measurement used to determine success with this program is through follow-up calls to the landlord or property managers six months after assistance is provided. ECHO's goal is that at least two-thirds of households will be considered successful. A successful follow-up would mean that a household was in their apartment and current with their rent, are in the apartment and owe a small amount with a payment arrangement, or have moved from the apartment willingly without owing money. Data collected from 2022 shows 81% of households with successful follow-up contacts. Results from 2021 shows successful outcomes to be 83%. These outcome results may have been affected by the existence of WERA funding in the community through April 2023, however, in most years pre-pandemic, the follow-up results typically remained around 70%.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

ECHO offers case management services to anyone who is seeking services. Client Advocates are available to households from the very beginning of the process, starting with the application. Each household spends an average of about two hours with their assigned Client Advocate prior to receiving rental assistance. Households often need assistance beyond the financial component paid to the landlord and will schedule continued appointments with a Client Advocate as needed. If a household is experiencing issues related to mental health, they may be eligible for the PATH program (Projects for Assistance in Transition from Homelessness) regardless of receiving rental assistance or not. The PATH program may assist households with diversion tactics and interventions in addition to connection with local resources such as mental health counseling, medical transit, or SOAR applications for SSI/SSDI. The PATH program is available to households who have the threat of homelessness and may be enrolled for up to 60 days, or until the issue has resolved whether through rental assistance or diversion.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	60	29	37	18	60	30
31-50% CMI	106	43	80	36	120	60

0-31% CMI	249	108	126	56	250	115
--------------	-----	-----	-----	----	-----	-----

J. Project Budget

Completed by jlocher@echojanesville.org on 7/31/2023 11:45 AM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

- 1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
- 2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

- 1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
- 2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Rental Assistance	\$15,000.00
Total	\$15,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual	Total Annual
------	-------	--------------	--------------

		Salary	Benefit Costs
--	--	---------------	----------------------

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$158,429.47	\$63,000.00	\$60,000.00
Contributions	\$587,124.00	\$680,850.00	\$680,850.00
Foundations & Venture Grants	\$67,431.00	\$50,000.00	\$50,000.00
Special Events	\$126,855.00	\$100,000.00	\$100,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00

Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$367,140.60	\$530,600.00	\$530,600.00
Blackhawk Region United Way	\$134,500.00	\$180,000.00	\$180,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$278.00	\$100.00	\$100.00
Misc. Revenue (not otherwise listed)	\$0.00	\$500.00	\$500.00
Total Support and Revenue	\$1,441,758.07	\$1,605,050.00	\$1,602,050.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$477,032.00	\$725,000.00	\$725,000.00
Employee Benefits	\$12,891.00	\$13,000.00	\$13,000.00
Payroll Taxes	\$35,734.00	\$55,463.00	\$55,463.00
Professional Fees	\$25,558.00	\$31,500.00	\$31,500.00
Supplies	\$3,224.00	\$3,000.00	\$3,000.00
Telephone	\$13,841.00	\$20,000.00	\$20,000.00
Postage	\$2,900.00	\$5,000.00	\$5,000.00
Occupancy (building grounds utilities)	\$37,349.00	\$24,287.00	\$24,287.00
Equipment Rental & Maintenance	\$20,172.00	\$25,000.00	\$25,000.00
Printing Art Work Publications	\$966.00	\$2,000.00	\$2,000.00
Mileage for Staff	\$5,142.00	\$6,500.00	\$6,500.00
Conferences Conventions Meetings	\$2,329.00	\$2,500.00	\$2,500.00
Agency Dues	\$1,000.00	\$1,000.00	\$1,000.00
Awards Grants Individual Assistance	\$557,129.00	\$635,000.00	\$635,000.00

Officers & Directors Liability Insurance	\$7,802.00	\$14,000.00	\$14,000.00
Misc. Expenses (not otherwise listed)	\$37,379.00	\$41,200.00	\$41,200.00
Total Expenses (Before Depreciation)	\$1,240,448.00	\$1,604,450.00	\$1,604,450.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$201,270.07	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Emergency Food and Shelter Program	\$66,706.65	29	None

Emergency Solutions Grant	\$43,506.31	22	None
SAMSHA - PATH	\$89,000.00	4	None
HUD - COC YHDP	\$187,444.00	1	None
CDBG - City of Janesville	\$151,992.47	29	None

K. Agency Capacity

Completed by jlocher@echojanesville.org on 7/31/2023 11:48 AM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

ECHO has been providing services regularly in Beloit since 2018. Prior to that, funding for rental assistance was limited to Janesville residents due to capacity. The program has grown over the years to be able to expand to cover all of Rock County.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

ECHO has long history of utilizing state and federal funding to strengthen the rental assistance program. Community Development Block Grant funding has been received for 26 years. Emergency Food and Shelter Program funding has been received for 27 years. Emergency Solutions Grant/Homeless Prevention Program has been received for 13 years. State Shelter Subsidy Grant has been received for 18 years. Safe Shelter and Homelessness Grant funding has been received for 2 years. Projects for Assistance in Transition from Homelessness funding has been received for 4 years. ECHO just recently, in 2022, received Continuum of Care funding to administer a youth rapid re-housing program (YHDP) and provide a Youth Navigator staff position. In 2023, ECHO received additional ARPA funding through Rock County for emergency lodging.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

***No files uploaded*

Printed By: Brian Gile on 8/16/2023

27 of 30

L. Staffing Capacity

Completed by jlocher@echojanesville.org on 7/31/2023 11:50 AM

Case Id: 30190

Name: ECHO - NRSA - 2024

Address: 65 South High St., Janesville, WI 53548

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

The Executive Director and Operation Supervisor are responsible for implementation of ECHO's grant awards. The Operation Supervisor is responsible for compliance and reporting, including payment requests.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

ECHO's financial reports are prepared on a cash-flow basis, with accrual adjustments done after the close of our fiscal year (calendar year). ECHO has a Main checking account, as well as a Savings account that is accessed for cash flow. Summit Accounting prepares the payroll and payroll taxes, monthly financial reports and journal entries using QuickBooks. We have Representative Payee checking accounts for people with disabilities who cannot handle their own funds. The Executive Director issues account payables twice a month from the Main checking account with approval from the Board Treasurer, with forms indicating the code of accounts. The Executive Director also issue checks for rent and lodging payment on a weekly basis. The Housing and Homeless Supervisor performs that duty if the Executive Director is absent.

ECHO Executive Committee and Board receive monthly financial reports. The Executive Director updates them at any point-in-time about the status of funds. Auditors review our grant contracts, reports and reimbursements. We have not had any significant audit deficiencies.

The final audited 2022 financial statements are not ready at this time and are expected to be complete by September 2023. As soon as the audited financial statements are ready, they may be sent. ECHO has received a letter annually from Charity Navigator for six consecutive years, congratulating us on earning the coveted 4-Star Rating from Charity Navigator, because of having sound fiscal management and a commitment to accountability and transparency. Charity Navigator is America's largest independent charity evaluator. Using objective, data-driven analysis, Charity Navigator awards only the most fiscally responsible organizations a 4-star rating.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

ECHO uses Quickbooks for all fiscal accounting. All grant funding spent is put into an account class for reporting purposes. ECHO also uses other excel workbooks to track expenses to ensure expenses and revenue are correct. ECHO is also audited on an annual basis.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

ECHO collects income documentation for earned income, child support, social security, SSI/SSDI benefits, unemployment, rental subsidies, W2, self-employment, and any other money coming into the household. County Median Income is figured based on a calculation of the past six months of income and projecting the next six months.

Other relevant data (demographics, veteran status, disability, etc.) is tracked in Clarity Human Services, Wisconsin's Homeless Management Information System (HMIS).

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Wisconsin Identification Cards/Driver's License and Social Security documentation is requested of all rental assistance applicants. Copies of filed tax returns may also be accepted if presented with Social Security numbers.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Staff refers to the Assessor data and Rock County property tax records as well as matching the address on a map.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30193
Name: Family Services of Southern Wisconsin and
Address: 416 College Street, Beloit, WI 53511

Completed by jpfleiderer@familyservices1.org on 7/6/2023 3:05 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Family Services of Southern Wisconsin and Northern Illinois, Inc.

A.2. Organization Address

416 College Street Beloit, WI 53511

A.3. Phone Number

(608) 365-1244

A.4. Fax Number

(608) 365-4097

A.5. Unique Entity Identifier (UEI) #

390833966

A.6. Agency CAGE/SAM #

4P1F9

A.7. Executive Director/Chairperson

John Pfleiderer

A.8. Email Address

jpfleiderer@familyservices1.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

15

PROJECT INFORMATION

A.11. Project Name

Neighborhood (Family) Resilience Project (NFRSA)

PRIMARY CONTACT #1

A.12. First Name

John

A.13. Last Name

Pfleiderer

A.14. Email Address

jpfleiderer@familyservices1.org

A.15. Phone Number

(608) 365-1244

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

John

A.17. Last Name

Pfleiderer

A.18. Email

jpfleiderer@familyservices1.org

A.19. Phone Number

(608) 365-1244

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by jpfleiderer@familyservices1.org on 7/6/2023 3:14 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

The Neighborhood Family Resilience Project works with low to moderate income single parent (typically women) headed households with young children residing within the Merrill or Hackett Neighborhoods (Census Tracts 16 and 18). In addition to their limited incomes, the majority have been subjected to domestic violence and other forms of trauma, and face significant levels of housing insecurity.

C. Project Type

Completed by jpfleiderer@familyservices1.org on 7/6/2023 3:21 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. Public Services – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning

C.2. Non Public Services Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition,

- Subsistence Payments (one time or short term emergency payments on behalf of clients.)
- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

construction, reconstruction, rehabilitation, or installation of public facilities and improvements

Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services

Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

The project is intended to address as many areas of participant vulnerability as possible. While continuity of access to safe housing has become the most significant issue (and challenge), we provide access to tangible resources (e.g., auto repairs) as well as counseling, life skills development, and advocacy. We are also strongly promoting early childhood learning opportunities.

D. Consolidated Plan Goal

Completed by jpfleiderer@familyservices1.org on 7/6/2023 3:38 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

Because the families we serve face a disproportionate constellation of complex and evolving challenges and because these challenges are often "interlocking" (e.g., no working automobile can result in loss employment and thus loss of income, and thus loss of housing), it is imperative that the services provided are "strategic" - that is, the appropriate support/advocacy for the most urgent needs while also recognizing/attending to emerging threats (e.g., pending sales of the rental properties.) We use a "Self-Sufficiency" measurement tool that allows the participant and the team to be able to track areas of vulnerability and thus develop together plans and timelines for addressing a variety of challenges. (At the same time, this approach recognizes and validates the participants' perspectives and priorities.) The scope of the Self-Sufficiency measures is comprehensive: Community Involvement, Parenting Skills, Legal Concerns, Emotional Health, Substance Abuse, Safety within the Home, Safety within the Neighborhood, Ability/Disabilities, Housing Status, Employment Status, Income, Food access and quality, Child Care, Children's Education, Adult Education, Home Economics/skills, Household and Social Relationships.

E. Conflict of Interest

Completed by jpfleiderer@familyservices1.org on 7/6/2023 3:39 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by jpfleiderer@familyservices1.org on 7/7/2023 9:49 AM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

2023 board roster --.docx

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

2023 -Articles of Incorporation.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

2023 Tax Exempt Certificate 2021 (new number) (1).pdf

2023 Wisconsin Department of Financial Institutions re status of Agency.doc

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

2023 22 June Board Meeting Minutes-.doc

 **Designation of Authorized Official – Include only one copy**

*Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

2023 for 2024 NRSA CDBG authorized signatory letter.doc

 **Organizational Chart – Include only one copy**

*An organizational chart must be provided that describes the agency's administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

2023 Family Services Organizational Chart

 **Audit**

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

2022 Audit

Optional: NRSA Activity Qualifier

Completed by jpfleiderer@familyservices1.org on 7/12/2023 12:05 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

By helping to ensure on-going stable housing for the participants, we are able to increase the duration of their residency within the neighborhoods. Similarly, we are able to encourage and support financially access to and participation in job training. We use a comprehensive self-sufficiency assessment tool that includes the evaluation of improvements in employment and adult education. We also track progress in securing income, although the challenges of access to affordable/safe childcare continues to undercut levels of engagement in the workforce. Our staff also provides both information and advocacy for participant access to additional supportive resources.

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

Yes

Optional: CBDO Qualifier

Completed by jpfleiderer@familyservices1.org on 7/12/2023 12:30 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

"On January 17, 1934, the newly organized Family Service Association, a non-sectarian agency, began its work as a counselling and relief agency in the City of Beloit." We continue that mission (although we don't typically describe ourselves as a "relief agency.") Our services include mental health counseling for vulnerable populations, crisis and prevention services to those impacted by domestic violence, a distinct program for providing the nuanced services needed for survivors of sexual violence services, and the Neighborhood (Family) Resilience Project. (Our Youth2Youth program arguably is impactful in preventing youth substance abuse.) The Next Steps Project for homeless families with young children (primarily single parent families) is an effort to help address simultaneously the needs of two very vulnerable generations at critical junctures in their lives.

Supporting Documentation (if applicable)

***No files uploaded*

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

No

5. Does your governing body's membership consist of at least 51% or more of the following:

- low-moderate income residents, owners or

Printed By: Brian Gile on 8/16/2023

11 of 28

- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

*See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.

No

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5

**No files uploaded

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?

No

7. Does your agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?

No

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?

Yes

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?

10. Is your agency free to contract for goods and services from vendors of its own choosing?

Yes



If you answer “No” to any of the above questions, please submit your agency’s charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation

By-Laws

By-laws 2023.doc

G. Funding Priorities

Completed by jpfleiderer@familyservices1.org on 8/7/2023 4:04 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The Resilience Project has and continues to focus its efforts on empowering some of the most vulnerable families in

Printed By: Brian Gile on 8/16/2023

13 of 28

Beloit: economically vulnerable single parent families with young children occupying rental properties in the Merrill or Hackett neighborhoods. Through supportive case management, the project empowers and supports these families by helping improve their "levels of self-sufficiency." In particular, this entails helping to ensure that the families remain housed, have access to reliable and safe transportation, support for timely and appropriate access to healthcare; advocacy and education in a variety of life skills, especially those related to self-sufficiency.

H. Agency Summary

Completed by jpfleiderer@familyservices1.org on 8/14/2023 1:53 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Family Services has been in operation since the beginning of 1934, although early agency documents contend the agency - under a different name - began in 1914; a beginning the agency currently chooses to dismiss as an historical over-reach. Since 1934, the agency has been focused on assisting and empowering vulnerable families. Our mission of seeking to restore, sustain, and enhance families is based upon the impact of various forms of trauma and the processes involved in being able to "move past" that trauma. Family Services is registered as a 501(C)(3) non-profit organization.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

The project represents a programmatic strategy to most effectively respond to the critical needs of two populations: economically vulnerable and traumatized single parents responsible for raising children exposed to disproportionate levels of parental stress, the traumas of both poverty, disproportionate levels of maternal stress, and violence. The traumas and the stressors facing the parents, frequently result in limited opportunities to benefit from exposure to early cognitive learning/brain development. In other words, the program provides services intended to minimize the inter-generational transmission of poverty. By providing case management, supportive services, and tangible resources to the families we serve, we believe that we can assist the mothers in their goals of their children having better childhoods than they experienced as they experienced and that as adults, their children will be able to thrive and significantly contribute to the Beloit community. (Please see below the listing of areas of the families functioning. Depending upon the level of "self sufficiency" associated with the category, agency staff will either provide the service in order to assist improvement and/or will advocate/support access to services/resources the agency cannot provide.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

It has been said that a rising tide floats all boats. In many ways that is true, but the metaphor assumes that every boat awaiting the tide is sound enough to float. There certainly is controversy as to how good or how "bad" poverty and crime are in any particular city and the recent article claiming that Beloit is the worst city in Wisconsin arguably uses a biased approach to the data. However, the "fact" that the Merrill and Hackett neighborhoods are recognized by HUD as satisfying the criteria for designation as Neighborhood Revitalization Strategy Areas is significant as "the designated area must be documented as primarily residential and contain a percentage of low- and moderate-income residents [such that the number of] Low- and moderate-income residents must equal to a community's "highest quartile percentage" (as computed by HUD pursuant to 24 CFR 570.208(a)(1)(ii)) or 70 percent, whichever is less, but not less than 51

Printed By: Brian Gile on 8/16/2023

15 of 28

percent.” The program assesses the participating families through the use of a HUD-influenced Self Sufficiency Scale that evaluates the status of the families in terms of their mobility, involvement in the community, parenting skills/capacity, Legal concerns, Emotional health, Substance Abuse, Safety within the Home, Safety within the Neighborhood, Abilities/disabilities, Employment, Income, Food, Child Care, Children's Education, Adult Education, Health Care Coverage, Home skills, and Household and Social Relations. Not surprisingly, participants recorded the lowest level of self-sufficiency in terms of access to affordable/quality childcare. Employment, housing, abilities/disabilities and mobility were all identified as significant challenges/issues. Please note that the above concerns represent substantial and life defining hardships, if not roadblocks for both the parents and their children.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

Due to the shortage of affordable housing and the profound difficulties unhoused families confront when seeking to secure rental housing, are priorities have shifted to include a greater focus on ensuring that we can provide the families we serve with strategic counseling and additional financial support in order to remain housed.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

The program is unique primarily due to its longer term focus on a specific population (single parent families with young children residing in Census Tracts 16 and 18, its ability to provide case management and counseling services (we are currently in discussion with a retired RN, who will provide medical advocacy for our participants; one of the program's staff is completing the requirements necessary to serve as Doula. Because we focus on a relatively modest number of families, our services tend to not "wander" from our case load, although we do share information with our Community Action NRSA equivalent. We are also a voice with the Beloit Area Task Force On Homelessness. Stated differently, we "occupy" a specific part of the "continuum of care" for economically vulnerable families.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Internally, the Resilience Project works with the agency's counseling program, consults with the Youth2Youth Program (for resources), the Sexual Assault Recovery Program (for resources and therapeutic support) and the Defy Domestic Abuse program, also for resources and case management/services. As noted, we enjoy a mutually supportive relationship with Community Action's corresponding project.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Our client families are our best ambassadors within the community. Unfortunately, we have had no difficulty sustaining a client population and have done so through our own staff. We attend the Mothers' Group that is convened by Community Action for their NRSA participants. We have not conducted formal publicity/community awareness campaigns as we do not have the resources to meet the needs of an expanded caseload.

I. Project Summary

Completed by jpfleiderer@familyservices1.org on 8/15/2023 11:07 AM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

The families we serve have the greatest challenges with securing childcare, and thus not surprisingly significant difficulties securing adequate income/employment, housing insecurity is a problem shared by most, few have reliable/convenient access to transportation, and while there are negative outliers, their emotional health, safety within the neighborhood, access to food, social relationships are generally on the "plus" sides of the assessment scales. The mothers range in age with some having responsibility for their young grandchildren. The majority of families identify or are identified as Black. The most relevant characteristics are the mothers' commitment to their children and their tenacity in seeking ways to ensure that their children have better a better childhood than they themselves experience.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	case management, direct services, systems advocacy, critical resources, referrals additional resources/services	200	35	\$0.00
Q2 4/1/24-6/30/24	case management, direct services, systems advocacy, critical resources, referrals additional resources/services	200	35	\$16,666.00
Q3 7/1/24-9/30/24	case management, direct services, systems advocacy, critical resources, referrals additional resources/services	200	35	\$16,666.00
Q4 10/1/24	case management, direct	200	35	\$16,668.00

-12/31/24	services, systems advocacy, critical resources, referrals additional resources/services				
					\$50,000.00

I.3. How will you measure the success of the program? (2 points)

The success of the program is measured primarily through changes recorded/noted on a Self-Sufficiency scale. This form is used as an assessment tool by the homeless service providers and scores the functional status of a family's mobility, involvement in the community, parenting skills, Legal status, emotional health, Substance Abuse, Safety within the Home, Safety within the Neighborhood, Ability/Disability, Housing, Employment, Income, Food, Child Care, Children's Education, Adult Education, and Household/Social Relationships. Success is measured when there is sufficient evidence of stabilized improvement such that there is reason to believe that the family's functioning and well-being are both positive and relatively stable.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

On-going case management is predicated upon the development of a relationship between the participants and the service providers that is characterized by mutual respect and transparency. Participants are incentivized to participate in services, not simply because it may be an avenue for access to services, but because it is a relationship in which the participants are able to see evidence of increased security and, perhaps more importantly, that the support and advice they receive is effective. By relying on the assessment of various aspects of self-sufficiency, the participant is actively involved in determining priorities, strategies and their own roles in improving their status. Said differently, case management is not only strategic but also therapeutic for the participants and thus becomes a self-reinforcing approach for addressing many of life's challenges.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	0	0	0	0	0
31-50% CMI	0	0	0	0	0	0
0-31% CMI	69	18	135	35	200	50

J. Project Budget

Completed by jpfleiderer@familyservices1.org on 8/15/2023 2:33 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct wages, benefits, etc	\$25,000.00
Tangible Assistance such as rent subsidies, car repairs, work related materials	\$25,000.00

Total	\$50,000.00
-------	-------------

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Popoola, Chris	Project Manager	\$61,275.00	\$21,829
Spates, Ashauntee	Family Advocate	\$44,850.00	\$8,205
Jelinek, Jen	Family Counselor	\$33,041.00	\$4,100

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
emergency rent; employment related expenses, transportation, et al	\$25,000.00
Total	\$25,000.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$40,000.00	\$50,000.00	\$50,000.00
Contributions	\$30,000.00	\$13,000.00	\$35,100.00
Foundations & Venture Grants	\$50,000.00	\$112,500.00	\$111,500.00
Special Events	\$550.00	\$700.00	\$15,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$86,092.86	\$292,000.00	\$240,000.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00

Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$40,000.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$206,642.86	\$468,200.00	\$491,600.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$129,627.49	\$207,868.00	\$225,680.00
Employee Benefits	\$33,646.69	\$48,794.00	\$53,165.00
Payroll Taxes	\$9,324.97	\$20,692.00	\$22,450.82
Professional Fees	\$3,680.78	\$4,842.00	\$5,000.00
Supplies	\$447.43	\$500.00	\$550.00
Telephone	\$1,539.41	\$1,950.00	\$2,150.00
Postage	\$343.73	\$450.00	\$475.00
Occupancy (building grounds utilities)	\$767.68	\$1,400.00	\$1,525.00
Equipment Rental & Maintenance	\$616.55	\$1,400.00	\$1,000.00

Printing Art Work Publications	\$297.77	\$1,020.00	\$1,000.00
Mileage for Staff	\$0.00	\$600.00	\$600.00
Conferences Conventions Meetings	\$0.00	\$3,000.00	\$3,000.00
Agency Dues	\$94.31	\$100.00	\$100.00
Awards Grants Individual Assistance	\$56,599.44	\$168,200.00	\$175,000.00
Officers & Directors Liability Insurance	\$1,571.94	\$1,873.00	\$2,000.00
Misc. Expenses (not otherwise listed)	\$466.89	\$150.00	\$500.00
Total Expenses (Before Depreciation)	\$239,025.08	\$462,839.00	\$494,195.82

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	(\$32,383.10)	\$5,361.00	(\$1,995.80)
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Wisconsin Department of Administration ARPA	\$392,000.00	2	none

K. Agency Capacity

Completed by jpfleiderer@familyservices1.org on 8/14/2023 2:47 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

Twenty? At least back to when the Beloit Health Department closed and Family Services took on the "orphaned" Home Companion Registry.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

The agency has experience with Federal and State grants going back to the mid-1990's; our grant funding increased substantially with the development of the Defy Domestic Violence Beloit program, the Sexual Assault Recovery Program, and the Resilience project. Funding sources include Wi.Dept Health and Human Services, Federal Emergency Management; Violence Against Women Grant; Wi. Dept Children and Families grant (DV); Victim of Crime Act (VOCA); Emergency Solutions Grant. Since 2005, we have been responsible for the administration of over \$3,000,000 of grant funds... there has been a learning curve.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

2022 and 2021 Audit.pdf

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

Just last week, a client in our counseling program lodged a complaint with the State that our counseling staff person declined to "certify" her dog as a "therapy" dog. We have not yet been in contact with the licensure authority. Please note that (a) there are no certification standards for declaring an animal as qualifying for such a designation (b), the therapist is under no professional obligation to so designate an animal as therapeutic, (c) the counselor (via zoom) found no evidence over the course of several months of virtual therapy sessions that the dog was functioning as a therapy

Printed By: Brian Gile on 8/16/2023

25 of 28

animal nor was the evidence to suggest that the dog would, in fact, behave as a therapy dog in a public setting. In the absence of both evidence and responsibility in this regard, this complaint is not likely to be supported. There were some public complaints raised regarding the use of Royce School for the Next Steps Project. It is not clear to what extent these have been resolved or lost their energy.

 **Citizen Complaints/Negative Media Exposure**

2022 and 2021 Audit.pdf

L. Staffing Capacity

Completed by jpfleiderer@familyservices1.org on 8/15/2023 1:32 PM

Case Id: 30193

Name: Family Services of Southern Wisconsin and

Address: 416 College Street, Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Ms. Kelsey Hood Christenson (President and Chief Executive Officer) will oversee the program, Ms. Chris Popoola will manage programing and staff. Ms. Popoola will also be responsible for program compliance with funding restrictions et al and will provide direct oversight of service providers.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Ms. Cindy Pingel has managed the agency's accounts during the entire period of time in which we have received CDBG funding. We are in the process of pro-actively planning for her successor as her anticipated retirement date will follow completion of the 2022 agency audit.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

City of Beloit CDBG funds will continue to be segregated as a distinct line item; all CDBG eligible and attributed expenses will be coded by source and by specific individual program .

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

Because the project is based upon an intimate and on-going relationship with the participant family and because initial intake and relevant on-going progress documents include explicit references to the participants status relative to the above categories, the project is well situated to secure the necessary information prior to the provision of any CDBG reimbursable services.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

We request and require explicit/compelling documentation of the legal status of those we serve as a precondition for the delivery of any CDBG or other governmental services.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

The project's services are limited to those residing in the Hackett and Merrill neighborhoods (Census Tracts 16 and 18). We require documentation of residence (such as signed rental agreements) and physical evidence of occupancy.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30173
Name: CAI - MCC - 2024
Address: 20 Eclipse Center, Beloit, WI 53511

Completed by ewest@community-action.org on 6/27/2023 2:07 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Community Action, Inc. of Rock & Walworth Counties

A.2. Organization Address

20 Eclipse Center Beloit, WI 53511

A.3. Phone Number

(608) 313-1329

A.4. Fax Number

(608) 480-2976

A.5. Unique Entity Identifier (UEI) #

076137975

A.6. Agency CAGE/SAM #

A.7. Executive Director/Chairperson

Marc Perry

A.8. Email Address

mperry@community-action.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

17

PROJECT INFORMATION

A.11. Project Name

Merrill Community Center

PRIMARY CONTACT #1

A.12. First Name

Marc

A.13. Last Name

Perry

A.14. Email Address

mperry@community-action.org

A.15. Phone Number

(608) 313-1338

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Erick

A.17. Last Name

West

A.18. Email

ewest@community-action.org

A.19. Phone Number

(608) 313-1329

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by ewest@community-action.org on 6/27/2023 2:08 PM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

The Merrill Neighborhood and the Near West Side/Hackett Neighborhood are identified neighborhoods in Beloit that are low-to-moderate income. In addition, the seniors and youth attending and participating in programming at the Merrill Community Center reside in the Merrill Neighborhood. Overall, approximately one third of all youth in the City of Beloit live in households below poverty. The poverty rate for African-American and Latino youth remains significantly higher.

C. Project Type

Completed by ewest@community-action.org on 6/27/2023 2:10 PM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. Public Services – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning

C.2. Non Public Services Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition,

- Subsistence Payments (one time or short term emergency payments on behalf of clients.)
- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

construction, reconstruction, rehabilitation, or installation of public facilities and improvements

Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services

Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Our Merrill Community Center programs —Our Youth Program will focus on afterschool and summer programming for youth ages 6-18 that reside in the Merrill Neighborhood. The afterschool program will provide homework assistance and tutoring in order to ensure academic success. We will also provide character education programming that will promote self-esteem, respect for peers, promote healthy choices to avoid risky behaviors and provide education to prevent bullying. The summer program will include academic enrichment, character education and recreational activities in collaboration with the Beloit YMCA and the Stateline Boys and Girls Club.

The Senior Program at Merrill Community Center provides senior citizens recreational activities in a safe and fun environment. They also have the opportunity to get the necessary information through workshops or guest speakers that they may need as it pertains to their health, exercise, housing, etc. while socializing with their peers and gain a sense of self-sufficiency. This will aid many seniors in the Merrill Neighborhood as many are challenged with financial hardships, social isolation, limited access to available community resources, no transportation, and a lack of appropriate healthcare and exercise.

D. Consolidated Plan Goal

Completed by ewest@community-action.org on 7/5/2023 1:33 PM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

The Merrill Community Center boasts a wide array of programming activities for all age groups. These include numerous educational opportunities for youth, including a summer camp, as well as activities serving older residents of the area. In each of these, program participants are connected to valuable resources, experiences, and information that builds their resilience, skills, and preparedness for many life events that most will experience.

E. Conflict of Interest

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Completed by ewest@community-action.org on 6/26/2023 10:42 AM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Completed by ewest@community-action.org on 7/5/2023 1:34 PM

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

BOD List_2023-06-28.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles_of_Incorporation.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

IRS Determination.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

2024 CDBG Authorization to Request Funds.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 29

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. ***Required***

By Laws_Designation of Authorized official.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency's administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. ***Required***

Community Action Org Chart 2023.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

2022_CAI_Audit.pdf

Optional: NRSA Activity Qualifier

Completed by ewest@community-action.org on 7/6/2023 1:00 PM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

Merrill Community Center programs provide either long-term (more than a year, in all cases) case management or supportive wrap-around services to their program participants.

Merrill Community Center Programs – both the youth afterschool/summer and the senior programs at the Merrill Community Center will focus on stabilizing the Merrill Neighborhoods by providing a presence for children ages 6-18 (as well as their parents) and seniors to access services. CAI staff will specifically engage parents/guardians of school-aged youth 6-18 to identify academic and behavioral issues that programming can address through the implementation of evidence-based programming, as well as the utilization of proven youth development best practices. Afterschool programming for school-aged children will include homework assistance, tutoring and academic enrichment activities. In addition, the program will provide evidence-based programming to enhance social/emotional growth and learning; as well as increase self-efficacy. The senior programming will connect seniors with critical resources for emergency or basic needs as well as increasing access to skills training, education, and other support systems that enable them to achieve self-sufficiency. Seniors will participate in informational workshops relative to housing, health care, exercise, etc. as well as be given opportunities for recreational activities. All these services to both seniors and youth in the Merrill Neighborhood will be aimed at the overarching goal of assisting with the stabilization of those neighborhoods.

Printed By: Brian Gile on 8/16/2023

10 of 29

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

Yes

Optional: CBDO Qualifier

Completed by gileb@beloitwi.gov on 7/17/2023 10:40 AM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

Yes

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

Supporting Documentation (if applicable)

***No files uploaded*

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

No

5. Does your governing body's membership consist of at least 51% or more of the following:

- low-moderate income residents, owners or
- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

***See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.**

Yes

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5

Printed By: Brian Gile on 8/16/2023

12 of 29

***No files uploaded*

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?

Yes

7. Does your agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?

No

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?

Yes

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?

Yes

10. Is your agency free to contract for goods and services from vendors of its own choosing?

Yes



If you answer "No" to any of the above questions, please submit your agency's charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation

By-Laws

***No files uploaded*

G. Funding Priorities

Completed by ewest@community-action.org on 7/27/2023 11:06 AM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

Merrill Community Center programs provide either long-term (more than a year, in all cases) case management or

Printed By: Brian Gile on 8/16/2023

14 of 29

supportive wrap-around services to their program participants.

Youth and senior programs at the Merrill Community Center will focus on stabilizing the Merrill Neighborhoods by providing a presence for children ages 6-18 (as well as their parents) and seniors to access services. CAI staff will specifically engage parents/guardians of school-aged youth 6-18 to identify academic and behavioral issues that programming can address through the implementation of evidence-based programming, as well as the utilization of proven youth development best practices. Afterschool programming for school-aged children will include homework assistance, tutoring and academic enrichment activities. In addition, the program will provide evidence-based programming to enhance social/emotional growth and learning; as well as increase self-efficacy. The senior programming will connect seniors with critical resources for emergency or basic needs as well as increasing access to skills training, education, and other support systems that enable them to achieve self-sufficiency. Seniors will participate in informational workshops relative to housing, health care, exercise, etc. as well as be given opportunities for recreational activities. All these services to both seniors and youth in the Merrill Neighborhood will be aimed at the overarching goal of assisting with the stabilization of those neighborhoods.

H. Agency Summary

Completed by ewest@community-action.org on 8/9/2023 8:17 AM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Community Action, Inc. of Rock and Walworth County was incorporated November 22, 1965 to prevent and reduce poverty in our local communities. We are a non-stock corporation.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

Community Action's Merrill Community Center Programs — Our Youth Program will focus on afterschool and summer programming for youth ages 6-18 that reside in the Merrill Neighborhood. The afterschool program will provide homework assistance and tutoring in order to ensure academic success and will focus on youth ages 6-12. We will also provide character education programming that will promote self-esteem, respect for peers, promote healthy choices to avoid risky behaviors and provide education to prevent bullying. The summer program will focus on academic enrichment, character education and recreational activities in collaboration with the Welty Environmental Education Center and the Stateline Boys and Girls Club. The Senior Program is very important to the senior citizens in the Merrill Neighborhood as it provides them with recreational activities in a safe and fun environment. They also have the opportunity to get the necessary information that they may need as it pertains to their health, exercise, housing, etc. while socializing with their peers and gain a sense of self-sufficiency. Many of the seniors in the Merrill Neighborhood are challenged with financial hardships, social isolation, limited access to available community resources, no transportation, and a lack of appropriate healthcare and exercise. Merrill Center fills a need by offering older adults a place to be where they can feel connected and a sense of independence. Research shows that social networking and having a strong sense of inclusiveness is crucial as a person ages.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Nearly a third of youth from low-income families fail to earn high school diplomas, approximately three times greater than the percentage of youth from middle-income families and roughly six times greater than the percentage of youth from high-income families. At-risk youth are often identified after skipping school, drinking under age and displaying disruptive behavior. These behaviors can be precursors to dropping out of school, acquiring low paying jobs and/or unemployment, and adult criminal behavior.

Behavior is learned by observation of the experiences of others and the outcomes of those experiences. Observation alone does not necessarily result in behavior change—it must be practiced. Individuals are more likely to adopt a behavior if they are aware of the potential outcomes and associate these outcomes with things they value. Effectively adapting a new behavior is directly affected by an individual's belief in their ability to change.

Printed By: Brian Gile on 8/16/2023

16 of 29

Services directed at the social/emotional needs of youth are necessary in curbing abhorrent behavior. Involving youth in social skills groups or outside activities helps to engage them in the school process and redirect their energies toward positive alternatives.

Through the utilization of evidence-based prevention programming and the implementation of youth development best practices, CAI will prevent youth participating in after school and summer programming from engaging in risky behaviors. 80% of children who participate in the Merrill Community Center After School program will complete a minimum of 20 hours of evidence-based character education programming. Merrill Community Center will provide 180 hours of summer programming for youth. The program will be based on Social Cognitive Learning Theory, which is the belief that youth learn best in peer group settings through sharing knowledge and experiences with their peers.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

This program remains impactful and has not experienced any expansion or significant changes in the past 12 months.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

The Merrill Community Center is a salient program for citizens in the Merrill Neighborhood. Many of the individuals and families are challenged with financial hardships, social isolation, limited access to available community resources, no transportation, and a lack of health services. Merrill Community Center fills a need by offering families a place where they can feel connected and a sense of independence. The Merrill Community Center is a venue where citizens can benefit from a variety of programs and services ranging from health services, to exercise and nutrition classes, to information and assistance on health care, insurance, housing and other community support services, to financial literacy as well as social events and programming. We work extensively with numerous community partners to ensure that while meeting the needs of the community, we do not unnecessarily duplicate any services.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Stateline Boys and Girls Club
Wisconsin Challenge Academy
Milwaukee Job Corps
Family Services Financial literacy/Counseling Services and Domestic Violence referrals
PAWG-Porter Avenue Watch Group
State Farm Insurance
Santana Furniture
Beloit Salvation Army
Beloit School District/Early literacy Program
Beloit Stateline literacy council Program
Beloit Alzheimer's Alliance
Beloit Grinnell Hall
Beloit Health Systems-Alert Line
Beloit Health System –Family care Center Educational Classes
Beloit St. Vincent DePaul
Beloit WIC Program
Beloit Area Health Clinic
Beloit Caritas
Beloit Stateline Pregnancy Foundation

Beloit Youth to Youth
Rock County WIOA Program
Rock County W2 Program
Rock County Council on Aging
Beloit Housing Section 8
Allegiant Property Management, LLC
Second Harvest Food Bank
Wisconsin Well Women Program
Shore West Realtors
YWCA Rock County
Children's Hospital of Wisconsin
Delavan PPH Clinic
Beloit Health Systems-Palliative Care
House of Mercy
Beloit Psychotherapy, LLC
Synergy Rental LLC
Willow Women's health care

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Community Action has a robust media exposure managed by a Public Relations Manager to ensure widespread communication. We also maintain online social media accounts and work with several community partners to promote events, activities, and all programming opportunities. Those partnerships are often strategically located to target low and moderate income households. We are also able to utilize referrals through many of our other agency programs to reach those in need with the services offered through this program.

I. Project Summary

Case Id: 30173

Name: CAI - MCC - 2024

Completed by ewest@community-action.org on 8/9/2023 2:20 PM

Address: 20 Eclipse Center, Beloit, WI 53511

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

The Merrill Community Center serves families with a focus on children and seniors primarily in areas with a high concentration of ethnic minorities.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Youth attend afterschool program, which provides homework assistance and tutoring as well as recreation and character education programming to youth ages 6-16 that primarily reside in the Merrill and Hackett Neighborhoods. <ul style="list-style-type: none">Seniors attend informational workshops and recreational activities at the Merrill Community Center.	42	12	\$3,750.00
Q2 4/1/24-6/30/24	Youth attend afterschool program, which provides homework assistance and tutoring as well as recreation and character education programming to youth ages 6-16 that primarily reside in the	42	12	\$3,750.00

	Merrill and Hackett Neighborhoods. • Seniors attend informational workshops and recreational activities at the Merrill Community Center.			
Q3 7/1/24-9/30/24	Youth attend afterschool program, which provides homework assistance and tutoring as well as recreation and character education programming to youth ages 6-16 that primarily reside in the Merrill and Hackett Neighborhoods. • Seniors attend informational workshops and recreational activities at the Merrill Community Center.	42	12	\$3,750.00
Q4 10/1/24-12/31/24	Youth attend afterschool program, which provides homework assistance and tutoring as well as recreation and character education programming to youth ages 6-16 that primarily reside in the Merrill and Hackett Neighborhoods. • Seniors attend informational workshops and recreational activities at the Merrill Community Center.	42	12	\$3,750.00
				\$15,000.00

I.3. How will you measure the success of the program? (2 points)

CAI will measure success by utilizing assessment tools built into the evidence-based character education programming. In addition, CAI will collaborate with the School District of Beloit to track the behavior referrals and academic performance of students enrolled in the after school program.

Nearly a third of youth from low-income families fail to earn high school diplomas, approximately three times greater than the percentage of youth from middle-income families and roughly six times greater than the percentage of youth from high-income families. At-risk youth are often identified after skipping school, drinking under age and displaying disruptive behavior. These behaviors can be precursors to dropping out of school, acquiring low paying jobs and/or

unemployment, and adult criminal behavior.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

Community Action tracks individual program outcomes using ROMA (Results Oriented Management and Accountability) guidelines. This system requires each individual program to track progress against anticipated outcomes quarterly, creating a process that requires ongoing evaluation and leads to successful outcomes. Ongoing case management is an important part of this process.

Program participants (both youth and seniors) are eligible also to remain in their respective Merrill Community Center Programs as long as they would like (children up to ages 6-12 years old in the afterschool program and 13-18 in summer programming). It is our hope that by having a safe haven for educational programming and recreational opportunities for both youth and seniors, they will stay in frequent contact with Community Action staff who have both knowledge and access to a myriad of services to enable them to have a better quality of life.

Parents of youth and seniors who visit the Merrill Community Center will have access to the Resource Navigator who will be able to provide resources and case management to them as well.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	9	0	2	0	5
31-50% CMI	0	17	0	25	0	20
0-31% CMI	0	22	0	10	0	20

J. Project Budget

Completed by ewest@community-action.org on 8/9/2023 12:46 PM

Case Id: 30173
Name: CAI - MCC - 2024
Address: 20 Eclipse Center, Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbridem@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Wages/Salary/Fringes	\$15,000.00
Total	\$15,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Angelina Reyes	MCC Program Manager	\$10,000.00	2250
Mary Gut	Program Assistant	\$2,000.00	750

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$7,978.00	\$15,000.00	\$15,000.00
Contributions	\$7,270.00	\$9,400.00	\$10,000.00
Foundations & Venture Grants	\$0.00	\$0.00	\$0.00

Special Events	\$0.00	\$0.00	\$0.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$121,158.00	\$0.00	\$74,502.00
Blackhawk Region United Way	\$0.00	\$132,201.00	\$60,000.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$136,406.00	\$156,601.00	\$159,502.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$94,961.00	\$98,333.00	\$105,334.00
Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$0.00	\$0.00	\$0.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$3,143.00	\$3,220.00	\$3,220.00
Telephone	\$0.00	\$0.00	\$0.00
Postage	\$0.00	\$0.00	\$0.00
Occupancy (building grounds utilities)	\$16,295.00	\$17,100.00	\$18,000.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$0.00	\$0.00	\$0.00
Mileage for Staff	\$0.00	\$4,300.00	\$4,300.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$7,580.00	\$8,000.00	\$8,000.00

Officers & Directors Liability Insurance	\$3,746.00	\$1,300.00	\$1,300.00
Misc. Expenses (not otherwise listed)	\$10,681.00	\$19,348.00	\$19,348.00
Total Expenses (Before Depreciation)	\$136,406.00	\$151,601.00	\$159,502.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
-----------------------	--------	---------------------	--

K. Agency Capacity

Completed by ewest@community-action.org on 8/9/2023 10:48 AM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

CAI has served the Beloit community for 58 years.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

CAI maintains multiple federally grant funded programs and is often sought as a fiscal agent in community partnerships due to the extensive experience gained from several decades of operation. Separate statements are maintained by our team of fiscal managers for all grant awards to ensure that all expenses are properly accounted. We have been a recipient of CDBG funding for the past 17 years and have maintained several other grant funded programs throughout that time, some dating back several decades.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

Community Action has not received any findings or concerns related to a financial audit or grant monitoring resulting in a loss of funding.

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

Community Action has not received any substantiated citizen complaints or experiences any negative media exposure during the past three years.

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by ewest@community-action.org on 8/9/2023 8:48 AM

Case Id: 30173

Name: CAI - MCC - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Angelina Reyes serves as the Program Manager of the Merrill Community Center and is the primary person responsible for overseeing this program with on-site support from Mary Gut. She is also supported by the management team at Community Action including Community Program Director Elizabeth Knapp-Spooner and Executive Director, Marc Perry. Reporting is managed by the agency Grant Compliance Manager Sara Schumacher.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Community Action, Inc. of Rock and Walworth Counties (CAI) maintains a uniform double-entry, full accounting system and financial management information system in accordance with Generally Accepted Accounting Principles. A chart of accounts is maintained to ensure proper segregation of funds and to support accurate accounts of revenue and expenses for billing purposes. The accounting principles of CAI are consistent with all applicable laws and regulations as required by funding sources, grants, contracts, and in order to maintain not-for-profit status.

The department is led by a Finance Director who reports directly to our Executive Director. The department is filled by four additional fiscal managers who maintain a portfolio of program responsibilities and who maintain the appropriate grant requirements for each. CAI maintains multiple federally grant funded programs and is often sought as a fiscal agent in community partnerships due to the extensive experience gained from several decades of operation.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

CAI is required to follow various guidelines for allocating costs, which benefit more than one program or grant. For this purpose, a Cost Allocation Plan is developed outlining the various methods of cost allocating expenses. A cost allocation basis is adopted each year that satisfies the requirements of all grants for that year. The cost allocation basis is modified any time a new program is started or at the end or beginning of any fiscal year. Due to the frequent modifications to the cost allocation basis, it is maintained outside of the accounting procedures manual.

An internal control system assures that there is sufficient segregation of duties to allow checks and balances within the Finance Department. An additional key aspect of internal control is that the Director of Finance reviews the transactions of the other employees & is responsible for noting any problems to the Executive Director and/or the Finance Committee. An inventory of all property and equipment with a value or cost of \$1,000 or more is maintained. The inventory document contains sufficient information for insurance and grant requirements.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals

Printed By: Brian Gile on 8/16/2023

28 of 29

served (cannot be reported by households). (2 points)

All program participants – including youth and seniors – of the Merrill Community Center Programs will complete an intake form. The program participants will also be entered into our client tracking software, Cap60, which meets various reporting and data tracking requirements for our various programs.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Client characteristic information is collected on intake forms and reported via database to our agency’s compliance manager, who prepares regular reports for funding sources requesting such data. Case managers and program managers review applicant’s intake forms for eligibility and program fit, and conduct interviews prior to program entrance, which include verification of identification such as a social security card.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Client characteristic information is collected on intake forms and reported via database to our agency’s compliance manager, who prepares regular reports for funding sources requesting such data. Case managers and program managers review applicant’s intake forms for eligibility and program fit, and conduct interviews prior to program entrance, which include verification of identification such as a social security card, verification of residence through proper identification, pay studs and utility bills. Programming also uses the United States Census Tract to verify city limits and neighborhoods. Additionally, as all children in the youth programming attend schools in Beloit, their residency is confirmed by the School District of Beloit. The seniors who participate in programming at the Merrill Community Center will be asked to provide proof of residency within the City of Beloit. (i.e. telephone statement, utility bill, etc.). We also utilize a mapping tool provided by the city of Beloit to confirm that addresses fall within the city limits.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30174
Name: CAI - NRSA - 2024
Address: 20 Eclipse Center, Beloit, WI 53511

Completed by ewest@community-action.org on 6/27/2023 2:15 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Community Action, Inc. of Rock & Walworth Counties

A.2. Organization Address

20 Eclipse Center Beloit, WI 53511

A.3. Phone Number

(608) 313-1300

A.4. Fax Number

(608) 480-2976

A.5. Unique Entity Identifier (UEI) #

076137975

A.6. Agency CAGE/SAM #

A.7. Executive Director/Chairperson

Marc Perry

A.8. Email Address

mperry@community-action.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

17

PROJECT INFORMATION

A.11. Project Name

NRSA - Resource Navigator

PRIMARY CONTACT #1

A.12. First Name

Marc

A.13. Last Name

Perry

A.14. Email Address

mperry@community-action.org

A.15. Phone Number

(608) 313-1338

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Erick

A.17. Last Name

West

A.18. Email

ewest@community-action.org

A.19. Phone Number

(608) 313-1329

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by ewest@community-action.org on 7/5/2023 1:44 PM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

All of the participants that receive services from the Resources Navigator will reside in the designated low-income neighborhoods. According to the most recent available EPA Environmental Justice Mapping Tool, the Merrill neighborhood is in the 90-95th percentile and the Hackett neighborhood are classified in the 95-100th percentile of low-income areas in the United States. The Resources Navigator serves as a reference point for strategic and purposeful assistance for the clients that request assistance. Through intense case management, the resources navigator will build trust with the city's most vulnerable populations and provide them with the resources to become self-sufficient for both themselves and their families.

C. Project Type

Completed by ewest@community-action.org on 6/27/2023 2:17 PM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. Public Services – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning

C.2. Non Public Services Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition,

- Subsistence Payments (one time or short term emergency payments on behalf of clients.)
- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

construction, reconstruction, rehabilitation, or installation of public facilities and improvements

Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services

Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

The Resources Navigator works specifically to address the needs of targeted populations in the cities most vulnerable neighborhoods.

D. Consolidated Plan Goal

Completed by ewest@community-action.org on 7/5/2023 1:45 PM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

The resources navigator will build trust with the city's most vulnerable populations and provide them with the resources to become self-sufficient for both themselves and their families. As described earlier, this is accomplished via intensive case management throughout the entire program year.

E. Conflict of Interest

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Completed by ewest@community-action.org on 6/27/2023 2:17 PM

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by ewest@community-action.org on 7/5/2023 1:45 PM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

BOD List_2023-06-28.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Articles_of_Incorporation.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

IRS Determination.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

2024 CDBG Authorization to Request Funds.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 27

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required*

By Laws_Designation of Authorized official.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required*

Community Action Org Chart 2023.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

2022_CAI_Audit.pdf

Optional: NRSA Activity Qualifier

Completed by ewest@community-action.org on 7/6/2023 1:02 PM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

The Resources Navigator will provide the resources to Beloit residents to increase their self-sufficiency as well as assist residents in gaining the skills and training necessary to obtain gainful employment. We will also use this funding for occasional eviction/homeless prevention. This will increase the number of long-term residents and permit clients to focus on being successful at work rather than being distracted with barrier to finding suitable shelter.

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

Yes

Optional: CBDO Qualifier

Completed by gileb@beloitwi.gov on 7/17/2023 10:41 AM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

Yes

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

Supporting Documentation (if applicable)

***No files uploaded*

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

No

5. Does your governing body's membership consist of at least 51% or more of the following:

- low-moderate income residents, owners or
- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

***See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.**

Yes

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5

Printed By: Brian Gile on 8/16/2023

11 of 27

***No files uploaded*

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?

Yes

7. Does your agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?

No

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?

Yes

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?

Yes

10. Is your agency free to contract for goods and services from vendors of its own choosing?

Yes



If you answer "No" to any of the above questions, please submit your agency's charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation



By-Laws

2021_Bylaws_Signed.pdf

G. Funding Priorities

Completed by ewest@community-action.org on 7/27/2023 10:46 AM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The Resources Navigator will provide the resources to Beloit residents to increase their self-sufficiency as well as assist

Printed By: Brian Gile on 8/16/2023

13 of 27

residents in gaining the skills and training necessary to obtain gainful employment. We will also use this funding for occasional eviction/homeless prevention. This will increase the number of long-term residents and permit clients to focus on being successful at work rather than being distracted with barrier to finding suitable shelter.

H. Agency Summary

Completed by ewest@community-action.org on 8/9/2023 9:07 AM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Community Action, Inc. of Rock and Walworth County was incorporated November 22, 1965 to prevent and reduce poverty in our local communities. We are a non-stock corporation.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

The Resource Navigator (RN) will assist thirty (30) individuals/families to obtain self-sufficiency through providing them with the community resources available to them in order to meet their individual needs. There are many resources available for families, however; oftentimes people are unaware and unsure how to navigate the resources on their own. The RN will provide assistance to residents living in the Hackett or Merrill neighborhoods. The RN will conduct an analysis of needs and provide resource referral services to all clients by facilitating and managing the coordination of agency and community resources available to clients. They will develop and maintain relationships with area service providers necessary to: remain up-to-date in the knowledge of available services, increase the services available to neighborhood residents, and better coordinate existing services in the interest of aiding residents to progress toward greater self-sufficiency as it relates to educational, financial, and basic needs. The RN will provide direct client services and case management as needed based on available resources.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

As stated, according to the most recent available EPA Environmental Justice Mapping Tool, the Merrill neighborhood is in the 90-95th percentile and the Hackett neighborhood are classified in the 95-100th percentile of low-income areas in the United States. The area served has the highest concentration of minority residents, oldest housing stock, highest unemployment rate, and lowest household income across the entire city. All of these factors, and more, create additional barriers in reaching needed resources and services which is why it has been designated for NRSA and why it remains a focus of this programmatic effort.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

This program remains impactful and has not experienced any expansion or significant changes in the past 12 months.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar

Printed By: Brian Gile on 8/16/2023

15 of 27

services to ensure efficient, unduplicated delivery of services. (2 points)

While other referral services do exist in the area, this project is unique as it serves as a specific point of reference for areas that historically lack trust with certain service areas. Many of the individuals and families are challenged with financial hardships, social isolation, limited access to available community resources, no transportation, and a lack of health services. The individual case management component allows that trust to continue to grow, which allows a more comprehensive set of circumstances for those individuals served. The trust then extends to others in the community to extend the reach even further. The program helps residents feel connected while still maintaining a sense of independence.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

- Stateline Boys and Girls Club
- Wisconsin Challenge Academy
- Milwaukee Job Corps
- Family Services Financial literacy/Counseling Services and Domestic Violence referrals
- PAWG-Porter Avenue Watch Group
- State Farm Insurance
- Santana Furniture
- Beloit Salvation Army
- Beloit School District/Early literacy Program
- Beloit Stateline literacy council Program
- Beloit Alzheimer’s Alliance
- Beloit Grinnell Hall
- Beloit Health Systems-Alert Line
- Beloit Health System –Family care Center Educational Classes
- Beloit St. Vincent DePaul
- Beloit WIC Program
- Beloit Area Health Clinic
- Beloit Caritas
- Beloit Stateline Pregnancy Foundation
- Beloit Youth to Youth
- Rock County WIOA Program
- Rock County W2 Program
- Rock County Council on Aging
- Beloit Housing Section 8
- Allegiant Property Management, LLC
- Second Harvest Food Bank
- Wisconsin Well Women Program
- Shore West Realtors
- YWCA Rock County
- Children’s Hospital of Wisconsin
- Delavan PPH Clinic
- Beloit Health Systems-Palliative Care
- House of Mercy
- Beloit Psychotherapy, LLC
- Synergy Rental LLC
- Willow Women’s health care

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

Community Action has a robust media exposure managed by a Public Relations Manager to ensure widespread communication. We also maintain online social media accounts and work with several community partners to promote events, activities, and all programming opportunities. Those partnerships are often strategically located to target low and moderate income households. We are also able to utilize referrals through many of our other agency programs to reach those in need with the services offered through this program.

I. Project Summary

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

Completed by ewest@community-action.org on 8/14/2023 1:36 PM

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

The Merrill and Hackett Neighborhoods are identified in NRSA as target areas within the City of Beloit. African-American and Latino residents in the these areas are more likely to live at or below poverty and are more likely to need direction to area services than residents in other neighborhoods in Beloit.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Develop and maintain a caseload from the designated Neighborhood Revitalization Strategy Areas (NRSA) of Merrill and Hackett.	7	7	\$12,500.00
Q2 4/1/24-6/30/24	Develop and maintain a caseload from the designated Neighborhood Revitalization Strategy Areas (NRSA) of Merrill and Hackett.	8	8	\$12,500.00
Q3 7/1/24-9/30/24	Develop and maintain a caseload from the designated Neighborhood Revitalization Strategy Areas (NRSA) of Merrill and Hackett.	7	7	\$12,500.00
Q4 10/1/24-12/31/24	Develop and maintain a caseload from the designated Neighborhood	8	8	\$12,500.00

	Revitalization Strategy Areas (NRSA) of Merrill and Hackett.			
				\$50,000.00

I.3. How will you measure the success of the program? (2 points)

By maintaining a case load of at least thirty (30) individuals/families, the Resource Navigator will provide participants with the community resources available to them in order to meet their individual needs. Progress will be tracked by determining how many of the needs were met and the changing circumstances of the managed individuals/families. The intent is for 100% of those served to improve their self sufficiency by virtue of connection to/and completion of available resources.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

Community Action tracks individual program outcomes using ROMA (Results Oriented Management and Accountability) guidelines. This system requires each individual program to track progress against anticipated outcomes quarterly, creating a process that requires ongoing evaluation and leads to successful outcomes. Ongoing case management is an important part of this process.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	2	2	0	0	0	0
31-50% CMI	7	7	0	0	0	0
0-31% CMI	28	28	13	13	30	30

J. Project Budget

Completed by ewest@community-action.org on 8/9/2023 2:14 PM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Wages/Salary/Fringes	\$50,000.00
Total	\$50,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual	Total Annual
------	-------	--------------	--------------

Printed By: Brian Gile on 8/16/2023

20 of 27

		Salary	Benefit Costs
Angelina Reyes	MCC Program Manager	\$36,775.00	6485
Mary Gut	MCC Program Staff	\$5,150.00	1590

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$50,000.00	\$50,000.00	\$50,000.00
Contributions	\$0.00	\$0.00	\$0.00
Foundations & Venture Grants	\$0.00	\$0.00	\$0.00
Special Events	\$0.00	\$0.00	\$0.00

Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$27,425.00	\$42,550.00	\$42,550.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$77,425.00	\$92,550.00	\$92,550.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$42,245.00	\$70,880.00	\$70,880.00
Employee Benefits	\$0.00	\$0.00	\$0.00
Payroll Taxes	\$0.00	\$0.00	\$0.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$3,311.00	\$3,420.00	\$3,420.00
Telephone	\$0.00	\$0.00	\$0.00
Postage	\$0.00	\$0.00	\$0.00
Occupancy (building grounds utilities)	\$2,817.00	\$4,800.00	\$4,800.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$0.00	\$0.00	\$0.00
Mileage for Staff	\$825.00	\$1,600.00	\$1,600.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$18,915.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00

Misc. Expenses (not otherwise listed)	\$9,312.00	\$11,850.00	\$11,850.00
Total Expenses (Before Depreciation)	\$77,425.00	\$92,550.00	\$92,550.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
-----------------------	--------	---------------------	--

K. Agency Capacity

Completed by ewest@community-action.org on 8/9/2023 10:48 AM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

CAI has served the Beloit community for 58 years.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

CAI maintains multiple federally grant funded programs and is often sought as a fiscal agent in community partnerships due to the extensive experience gained from several decades of operation. Separate statements are maintained by our team of fiscal managers for all grant awards to ensure that all expenses are properly accounted. We have been a recipient of CDBG funding for the past 17 years and have maintained several other grant funded programs throughout that time, some dating back several decades.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

Community Action has not received any findings or concerns related to a financial audit or grant monitoring resulting in a loss of funding.

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

Community Action has not received any substantiated citizen complaints or experiences any negative media exposure during the past three years.

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by ewest@community-action.org on 8/9/2023 8:49 AM

Case Id: 30174

Name: CAI - NRSA - 2024

Address: 20 Eclipse Center, Beloit, WI 53511

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Angelina Reyes serves as the Program Manager of the Merrill Community Center and is the primary person responsible for overseeing this program with on-site support from Mary Gut. She is also supported by the management team at Community Action including Community Program Director Elizabeth Knapp-Spooner and Executive Director, Marc Perry. Reporting is managed by the agency Grant Compliance Manager Sara Schumacher.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

Community Action, Inc. of Rock and Walworth Counties (CAI) maintains a uniform double-entry, full accounting system and financial management information system in accordance with Generally Accepted Accounting Principles. A chart of accounts is maintained to ensure proper segregation of funds and to support accurate accounts of revenue and expenses for billing purposes. The accounting principles of CAI are consistent with all applicable laws and regulations as required by funding sources, grants, contracts, and in order to maintain not-for-profit status.

The department is led by a Finance Director who reports directly to our Executive Director. The department is filled by four additional fiscal managers who maintain a portfolio of program responsibilities and who maintain the appropriate grant requirements for each. CAI maintains multiple federally grant funded programs and is often sought as a fiscal agent in community partnerships due to the extensive experience gained from several decades of operation.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

CAI is required to follow various guidelines for allocating costs, which benefit more than one program or grant. For this purpose, a Cost Allocation Plan is developed outlining the various methods of cost allocating expenses. A cost allocation basis is adopted each year that satisfies the requirements of all grants for that year. The cost allocation basis is modified any time a new program is started or at the end or beginning of any fiscal year. Due to the frequent modifications to the cost allocation basis, it is maintained outside of the accounting procedures manual.

An internal control system assures that there is sufficient segregation of duties to allow checks and balances within the Finance Department. An additional key aspect of internal control is that the Director of Finance reviews the transactions of the other employees & is responsible for noting any problems to the Executive Director and/or the Finance Committee. An inventory of all property and equipment with a value or cost of \$1,000 or more is maintained. The inventory document contains sufficient information for insurance and grant requirements.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals

Printed By: Brian Gile on 8/16/2023

26 of 27

served (cannot be reported by households). (2 points)

All program participants complete an intake form similar to that of other programs. The program participants will also be entered into our client tracking software, Cap60, which meets various reporting and data tracking requirements for our various programs.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Client information is collected on intake forms and reported via database to the agency's compliance manager. The compliance manager prepares regular reports for funding sources requesting that data and as such, is very familiar with the requirements. The Resources Navigator will review the applicant's intake forms for eligibility and conduct interview prior to program entrance. This process includes verification of identification, such as a social security card.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

All of the clients will need to verify that they not only reside within city limits but also that they live within the designated NRSA neighborhoods. Clients will be required to submit documentation, such as a driver's license with a current address, to verify that residency.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30189
Name: Legal Action of Wisconsin, Inc. - 2024
Address: 744 Williamson Street, Suite 200, Madison, WI

Completed by src@legalaction.org on 7/7/2023 4:26 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Legal Action of Wisconsin, Inc.

A.2. Organization Address

744 Williamson Street Suite 200 Madison, WI 53703

A.3. Phone Number

(608) 256-3304

A.4. Fax Number

(608) 256-0510

A.5. Unique Entity Identifier (UEI) #

GC2GT14GZY97

A.6. Agency CAGE/SAM #

41JY7

A.7. Executive Director/Chairperson

Deedee Peterson

A.8. Email Address

ddp@legalaction.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

3

PROJECT INFORMATION

A.11. Project Name

Community Lawyer Project

PRIMARY CONTACT #1

A.12. First Name

Stacia

A.13. Last Name

Conneely

A.14. Email Address

src@legalaction.org

A.15. Phone Number

(608) 620-2012

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Allison

A.17. Last Name

Creekmur

A.18. Email

apc@legalaction.org

A.19. Phone Number

(608) 620-2003

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by src@legalaction.org on 7/7/2023 4:32 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

Our Community Lawyer will provide legal assistance to and educate City of Beloit residents that are low- and moderate-income.

C. Project Type

Completed by src@legalaction.org on 7/7/2023 4:34 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

4 of 28

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

The Community Lawyer provides legal services to City of Beloit residents.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

n/a

D. Consolidated Plan Goal

Completed by src@legalaction.org on 7/7/2023 4:50 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

The Community Lawyer represents tenants in eviction, with the goal to prevent eviction and homelessness. In addition, the Community Lawyer represents and educates tenants on their rights to a safe home and how to report unsafe conditions or possibly bring action against a landlord.

E. Conflict of Interest

Completed by src@legalaction.org on 7/7/2023 4:51 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by src@legalaction.org on 7/10/2023 4:28 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation



List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

Legal Action of Wisconsin Inc Board of Directors List 4.19.2023.pdf



Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

Legal Action Restated Articles of Incorporation 4-1-1977.pdf



Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

IRS 501(c)(3) Exempt Determination.pdf



Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

Authorization To Request Funds - Legal Action - Awaiting Board vote.pdf



Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

8 of 28

the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required

Legal Action Designation of Authorized Official - Staff Manual Role of Board of Directors and Committees.pdf

Organizational Chart – Include only one copy

An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required

Legal Action Organizational Chart August 2020.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

Legal Action of Wisconsin Audit Report 2021.pdf

Optional: NRSA Activity Qualifier

Completed by src@legalaction.org on 7/7/2023 5:26 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

The Community Lawyer will educate and advise tenants on how to seek repairs to housing in disrepair, instead of moving out of properties. In addition, a goal will be to keep tenants in their homes through eviction prevention, which will reduce the number of vacant properties after evictions and increase long-term residency.

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

No

If the agency is not located within the Merrill or Hackett neighborhoods, please thoroughly explain how services are being delivered directly to residents of the NRSA neighborhoods.

The Community Lawyer meets with tenants in person at their homes, community centers, the library, and other trusted organizations, as well as regularly communicates with clients by phone, email, and texts.

Optional: CBDO Qualifier

Completed by src@legalaction.org on 7/10/2023 4:29 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

Yes

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

We are the state's largest non-profit law firm providing free civil legal services to those who cannot afford it at the most vulnerable times in their lives. Our purpose and obligations are reflected in our bylaws, our Values, Vision, and Mission Statements, and our Priority Plan. Every year, the Board of Directors sets priorities and establishes the cases and matters which Legal Action may undertake to fulfill our mission of achieving equal justice for low-income people by providing the most economical and effective legal services throughout our service area in the areas of law that have the greatest effect on their quality of life, financial stability, and neighborhood and family safety and stability. In addition, we have an obligation under federal regulations, as a recipient of funding from the Legal Services Corporation, to restrict some services to low income individuals.



Supporting Documentation (if applicable)

Legal Action of Wisconsin Bylaws as amended on 4.23.2022 Final.pdf

F Legal Action of Wisconsin 2023 priority plan adopted 12.10.22 Final.pdf

Legal Action Values, Vision, and Mission Statements.pdf

Legal Action Restated Articles of Incorporation 4-1-1977.pdf

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

Yes

Printed By: Brian Gile on 8/16/2023

11 of 28

5. Does your governing body's membership consist of at least 51% or more of the following:

- low-moderate income residents, owners or
- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

*See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.

No

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5

**No files uploaded

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?

No

7. Does your agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?

Yes

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?

Yes

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?

No

10. Is your agency free to contract for goods and services from vendors of its own choosing?

Yes



If you answer "No" to any of the above questions, please submit your agency's charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation

By-Laws

Legal Action of Wisconsin Bylaws as amended on 4.23.2022 Final.pdf

G. Funding Priorities

Completed by src@legalaction.org on 8/15/2023 11:58 AM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The Community Lawyer will educate and advise tenants on how to seek repairs to housing in disrepair, instead of

moving out of properties. In addition, a goal will be to keep tenants in their homes through eviction prevention, which will reduce the number of vacant properties after evictions and increase long-term residency. The program will help meet the NRSA objectives under Neighborhood Revitalization of improving the quality of the housing stock, reducing the number of vacant and abandoned properties, and increase the percentage of long-term residents in the neighborhoods.

H. Agency Summary

Completed by src@legalaction.org on 8/15/2023 1:17 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Legal Action of Wisconsin, Inc. is the largest non-profit law firm in the state. We specialize in the areas of law that affect low-income people most often: housing, family, consumer, public benefits, and barriers to employment. Since its inception in 1968, the firm has identified housing as one of our priorities, and we have a dedicated housing committee and numerous attorneys with expertise in eviction, conditions, and other housing related areas. We are uniquely positioned to have the the expertise and experience to provide the services in this area in the fashion proposed.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

Project staff will engage in direct representation and strategic litigation directly related to a person's housing safety or stability. Staff will also develop and facilitate community education through written materials, guides, and training workshops. These training resources will be designed for renters in the Beloit community as well as for the social service agencies supporting people at risk of homelessness. This work aligns with the Beloit Area Taskforce on Homelessness' strategic plan, in particular the strategies to 1) utilize and provide education on legal empowerment tools, 2) have legal representation present in court and/or access to assistance prior to going to court, and 3) teach tenants how to assert their rights in positive ways.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Stable housing is important for all aspects of a person's life, making it easier to keep and find work, go to school, and reduce the physical and mental toll on a person's health. The community need for legal representation of tenants facing homelessness is always critical. The U.S. Census Bureau's household pulse survey (https://www.census.gov/data-tools/demo/hhp/#/?measures=EVICTFOR&s_state=00055&periodSelector=55) estimates that about 17% of Wisconsinites are currently in danger of either eviction or foreclosure. The eviction filings in Rock County has increased recently with 114 filings in June 2023, up from 48-75 in other months in 2023. Even in situations where a tenant can obtain sufficient and timely rental assistance funds, attorneys are critical to negotiating settlements with landlords that secure tenants' housing stability for as long as possible. Without this critical legal assistance in place, eviction judgments and homelessness will follow. With the end of substantial rent assistance funding, we expect that eviction filings will increase significantly. In addition, due to changes to the public health emergency, FoodShare benefits are dropping, and rent amounts have increased significantly, so families' funds are going to be stretched even thinner. We are already seeing people remaining in incredibly unsafe housing conditions because the fear of homelessness trumps the need to push for repairs. This means more community members and their children are living in homes that are making them sick

Printed By: Brian Gile on 8/16/2023

15 of 28

or that do not have adequate hygiene facilities, hot water, or heat. The City of Beloit indicated in its 2020-2024 Neighborhood Revitalization Strategy Areas Plan that a goal was to improve the quality of the housing stock, noting that tenants of low-moderate income may not have the financial resources to move from an unhealthy living environment. With legal representation and education on their rights, tenants will avoid eviction and protect their rights to safe housing.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

The program funds one attorney, who works with 2 other advocates that focus on serving Rock County. The attorney's knowledge of the community needs, connection to community groups, and understanding of the most urgent issues has improved over the past 12 months. After months of research and input from Beloit area case managers, her affirmative litigation has begun to focus on particular landlords or property managers who do not fix untenable housing conditions.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

Legal Action is the only civil legal aid provider in the City of Beloit, which means we are the only law firm providing free legal advice and representation to the community. There are other lawyers in the area, but they do charge a fee for services, which would be too expensive for those eligible under the CDBG rules.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Relationships and collaboration are at the heart of this work. Without these, client assistance is limited because the emergent legal issue is rarely the only emergency happening in a resident's life. Project staff will continue to meet on a regular basis with other social service agencies and participate in developing longer-term solutions to the safe and affordable housing crisis community members face. We plan on collaborating with community spaces where people are comfortable to host workshops about renters' rights and other supportive services to prevent homelessness. Examples of these spaces include the Beloit Public Library, neighborhood community centers, and schools. We are and will continue to be an active member of the Beloit Area Task Force on Homelessness. The task force is broken into committees to design and implement concrete solutions to the challenges low-income residents are facing in Beloit. Attorney Allison Creekmur facilitates the Communications committee right now, which is working on changing the language around homelessness to reflect a more accurate picture of what Beloit community members experience. Attorney Creekmur is also currently participating in the trial of a new approach to service provision with other Beloit Area Task Force on Homelessness members, developing a collaborative solutions model for serving families at risk of homelessness in Beloit. In addition, other Legal Action staff hold regular office hours at ECHO in Janesville and Blackhawk Technical College, as well as attend the Rock-Walworth Homeless Intervention Task Force.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

We are present at community events and spaces to share information about our services, such as back to school fairs and the Beloit Public Library. We have been and will continue to develop working relationships with the school district and community centers and be present on a regular basis. Project staff will work with Legal Action's Communications Director to implement a media campaign around know-your-rights information that will educate residents on their rights while also informing the community about the services we can offer to the Beloit community. The attorney regularly meets with the Beloit Area Task Force on Homelessness and the service providers, such as the Merrill Community Center and Family Services.

I. Project Summary

Completed by src@legalaction.org on 8/15/2023 2:29 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

We propose to primarily focus on two neighborhoods in Beloit – Hackett and Merrill – but we will be flexible to the needs we see in other areas. We have focused in that area over the past 3 years, and our clients have been mostly female-led households with children, and at least half have had a family member with a disability.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	<ul style="list-style-type: none">• Community outreach and education (approx. 40 of the 50 households and 50 of the 63 individuals)• Strategic litigation	63	50	\$12,500.00
Q2 4/1/24-6/30/24	<ul style="list-style-type: none">• Community outreach and education (approx. 40 of the 50 households and 50 of the 63 individuals)• Strategic litigation	63	50	\$12,500.00
Q3 7/1/24-9/30/24	<ul style="list-style-type: none">• Community outreach and education (approx. 40 of the 50 households and 50 of the 63 individuals)• Strategic litigation	63	50	\$12,500.00
Q4 10/1/24-12/31/24	<ul style="list-style-type: none">• Community outreach and education (approx. 40 of the 50 households and 50 of the 63 individuals)• Strategic litigation	63	50	\$12,500.00
				\$50,000.00

I.3. How will you measure the success of the program? (2 points)

Legal Action has a sophisticated database (Legal Server) where we collect and keep case information for all our clients and track advocate time. Advocates will utilize this existing system to track client casework, as well as time spent on outreach to those clients or community organizations in the target population. We will measure the success by reviewing the outcomes of the cases, such as prevention of eviction, prevention of homelessness, repairs made to homes, and number of residents we educate on tenants' rights.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

LAW does not provide case management like other homeless services providers. We provide legal representation. We do make connections with other providers regularly in order to make sure our clients know where to access case management. We meet regularly with the Beloit Area Task Force on Homelessness and other partners to discuss mutual clients and what services, legal or rental assistance or case management, are needed for those clients. In addition, our staff receive direct referrals from case managers, such as those from Family Services of Southern WI and Northern IL, to assist with the legal aspects of homelessness with which the case managers cannot help. Our staff also attend the Rock County Homeless Intervention Task Force membership meetings to make connections and learn about additional resources for our clients, as well as participate on the Homeless Intervention Task Force's committee addressing youth homelessness.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	3	2	2	1	2	1
51-80% CMI	1	1	11	4	6	5
31-50% CMI	13	4	13	5	13	10
0-31% CMI	37	18	25	14	31	24

J. Project Budget

Completed by src@legalaction.org on 8/15/2023 2:58 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Direct Program Expenses	\$1,400.00
Direct Wages/Salaries/Fringes	\$48,600.00
Total	\$50,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be

paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Allison Creekmur	Staff Attorney	\$89,388.00	1850.00
Alexis Camacho-Stedman	Paralegal	\$45,057.00	10381.00

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Mileage for staff to meet with participants or the community	\$1,000.00
Litigation expenses (ex. court case filing fees, records from Register of Deeds, property inspection records)	\$400.00
Total	\$1,400.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's	Current	Next Year's

	Actual (\$)	Year's Budget (\$)	Proposed (\$)
Community Development Block Grant (CDBG)	\$0.00	\$0.00	\$50,000.00
Contributions	\$0.00	\$0.00	\$0.00
Foundations & Venture Grants	\$0.00	\$0.00	\$0.00
Special Events	\$0.00	\$0.00	\$0.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$100,000.00	\$100,000.00	\$50,000.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$0.00	\$0.00	\$0.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the	\$0.00	\$0.00	\$0.00

Public/Product Sales			
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$100,000.00	\$100,000.00	\$100,000.00

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$87,388.00	\$89,388.00	\$91,388.00
Employee Benefits	\$1,850.00	\$1,850.00	\$2,000.00
Payroll Taxes	\$0.00	\$0.00	\$0.00
Professional Fees	\$0.00	\$0.00	\$0.00
Supplies	\$0.00	\$0.00	\$0.00
Telephone	\$0.00	\$0.00	\$0.00
Postage	\$0.00	\$0.00	\$0.00
Occupancy (building grounds utilities)	\$0.00	\$0.00	\$0.00
Equipment Rental & Maintenance	\$0.00	\$0.00	\$0.00
Printing Art Work Publications	\$0.00	\$0.00	\$0.00

Mileage for Staff	\$1,000.00	\$1,000.00	\$1,000.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00
Misc. Expenses (not otherwise listed)	\$400.00	\$400.00	\$400.00
Total Expenses (Before Depreciation)	\$90,638.00	\$92,638.00	\$94,788.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
------------------------------	---------------	----------------------------	---

K. Agency Capacity

Completed by src@legalaction.org on 8/15/2023 3:00 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

Legal Action has provided civil legal aid to the Beloit community since 1968. We began to dedicate one homelessness prevention attorney to the area in 2019.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

Legal Action has been receiving federal and state awards since its inception in 1968. The financial management staff administers an operating budget of about \$12 million a year, arising from 40 different funding sources, most of which are contracts and grants from public sources. We are supported by various funders, including the Legal Services Corporation, the Wisconsin Trust Account Foundation, the Office of Crime Victim Services, and the State of Wisconsin.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by src@legalaction.org on 8/15/2023 3:49 PM

Case Id: 30189

Name: Legal Action of Wisconsin, Inc. - 2024

Address: 744 Williamson Street, Suite 200, Madison, WI

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Attorney Allison Creekmur: Attorney Creekmur is the community lawyer who is on site in Beloit and creates and presents community education events. She will represent households in litigation and track necessary data for reporting.

Managing Attorney Stacia Conneely: Attorney Conneely will be the direct supervisor of the attorney for this project and will assist the attorney will implementing the goals of the project. She will provide required reporting.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

LAW's financial management staff administers an operating budget of about \$12 million a year, arising from 40 different funding sources, most of which are contracts and grants from public sources. Our accounting and finance department consists of a Chief Financial Officer, a Controller, and 3 FTE accounting and finance technicians and assistants.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

LAW maintains a computer accounting system in accordance with Generally Accepted Accounting Principles (GAAP). It is designed to provide accurate and timely reports of revenue and expenditures, and track revenue sources separately. An independent Certified Public Accountant is retained each year to audit the financial statements, internal controls, and grant compliance of LAW, subject to attorney-client privilege as governed by Wisconsin Supreme Court rules. Most of our funds will be used for staffing, and staff enter time by tenths of the hour into a database, and specify which case or project the time should be billed to.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

LAW has a sophisticated database (Legal Server) where we collect and keep case information for all our clients and track advocate time. Advocates will utilize this existing system to track client casework, as well as time spent on outreach to those clients or community organizations in the target population.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Legal Action is not allowed to represent non-citizens, unless they meet certain exceptions under the federal regulations that we have to follow as a recipient of Legal Services Corporation funds. We have clients sign a citizenship attestation form if we represent them and give more than just advice on a case. For non-citizens, we request additional

Printed By: Brian Gile on 8/16/2023

27 of 28

documentation of legal status, and that information is kept in our client files. We receive yearly training on how to request and review these kinds of documentation.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Since our litigation will be in eviction defense and housing conditions, we will have the residential address and can verify the address is within the city limits through Census Geocoder, if it is not otherwise apparent from court filings or other government records (such as housing inspection reports).

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes

A. Applicant and Project Information Summary

Case Id: 30192
Name: Pearl Transit Corp - 2024
Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

Completed by *jw@pearltransit.org* on 7/6/2023 1:51 PM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Pearl Transit Corp

A.2. Organization Address

525 RT 73 North Suite 104 Marlton, NJ 08053

A.3. Phone Number

(888) 976-9944

A.4. Fax Number

(888) 312-9995

A.5. Unique Entity Identifier (UEI) #

L9NME34DA793

A.6. Agency CAGE/SAM #

022644355

A.7. Executive Director/Chairperson

Jael Watts

A.8. Email Address

jw@pearltransit.org

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

3

PROJECT INFORMATION

A.11. Project Name

Oral health outreach for low income residents

PRIMARY CONTACT #1

A.12. First Name

Jael

A.13. Last Name

Watts

A.14. Email Address

jw@pearltransit.org

A.15. Phone Number

(888) 976-9944

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

A.17. Last Name

A.18. Email

A.19. Phone Number

B. National Objectives

Completed by jw@pearltransit.org on 7/6/2023 1:53 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide both health and aesthetic benefits for our consumers.

The partnered services of Pearl Transit and Oracle Dental employ state of the art digital technology to address oral health access barriers by eliminating the need for in office care, and making custom denture units available at no cost to those at risk of, or experiencing, homelessness..

Those who are most vulnerable to become homeless, including transportation disadvantaged individuals, people with disabilities, seniors and other groups for whom in office visits had been geographically and financially inaccessible receive custom fabricated denture units, manufactured in accordance with an individual treatment plan, as well as referrals to long term oral health resources.

C. Project Type

Completed by jw@pearltransit.org on 7/6/2023 1:54 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

5 of 39

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide both health and aesthetic benefits for our consumers.

The partnered services of Pearl Transit and Oracle Dental employ state of the art digital technology to address oral health access barriers by eliminating the need for in office care, and making custom denture units available at no cost to those at risk of, or experiencing, homelessness..

Those who are most vulnerable to become homeless, including transportation disadvantaged individuals, people with disabilities, seniors and other groups for whom in office visits had been geographically and financially inaccessible receive custom fabricated denture units, manufactured in accordance with an individual treatment plan, as well as referrals to long term oral health resources.

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

N/a

D. Consolidated Plan Goal

Completed by jw@pearltransit.org on 7/6/2023 1:54 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide both health and aesthetic benefits for our consumers.

The partnered services of Pearl Transit and Oracle Dental employ state of the art digital technology to address oral health access barriers by eliminating the need for in office care, and making custom denture units available at no cost to those at risk of, or experiencing, homelessness..

Those who are most vulnerable to become homeless, including transportation disadvantaged individuals, people with disabilities, seniors and other groups for whom in office visits had been geographically and financially inaccessible receive custom fabricated denture units, manufactured in accordance with an individual treatment plan, as well as referrals to long term oral health resources.

E. Conflict of Interest

Completed by jw@pearltransit.org on 7/6/2023 1:54 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by jw@pearltransit.org on 7/6/2023 5:04 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation



List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

BOARDOFDIRECTORSLIST.pdf



Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

PearlTransit_artofincorp.pdf



Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

501c3.pdf



Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

resolutioncdbgbeloit.pdf



Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

9 of 39

the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required

resolutioncdbgbeloit.pdf

Organizational Chart – Include only one copy

An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required

staffingplan_oralhealthoutreach.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

pearlaudit2022.pdf

Optional: NRSA Activity Qualifier

Completed by jw@pearltransit.org on 7/6/2023 5:08 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

Optional: NRSA Activity Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, the activity must meet all NRSA activity eligibility requirements identified in 24 CFR 570.204(a) and 24 CFR 570.204(b).

1. Which of the following NRSA Objectives would the proposed activity address? Check all that apply.

NEIGHBORHOOD REVITALIZATION

- Objective 1: Improve the quality of the housing stock
- Objective 2: Reduce the number of vacant and abandoned properties
- Objective 3: Increase the percentage of long-term residents in the neighborhoods

RESIDENT EMPOWERMENT

- Objective 4: Increase programming for job training and life skills education.
- Objective 5: Enhance programming activity for youth.
- Objective 6: Increase the involvement of residents in their neighborhoods.
- Objective 7: Connect residents to financial and supportive resources they need to be successful.
- Objective 8: Improve race relations in the community

2. Please explain how the proposed activity or project would address each of the NRSA Objectives selected above.

Poor oral health disproportionately affects homeless adults. A staggering 89% of homeless adults have missing teeth, and only 27% have had a dental visit in the preceding year (Gelberg et al., 1988; Kaste and Bolden, 1995).

Furthermore, "... oral disease poses as significant a barrier to employment and self-sufficiency as do problems with general or mental health." Hyde S, Satariano WA, Weintraub JA. Welfare dental intervention improves employment and quality of life. Journal of dental research. 2006;85(1):79–84.

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide both health and aesthetic benefits for our consumers.

The partnered services of Pearl Transit and Oracle Dental employ state of the art digital technology to address oral health access barriers by eliminating the need for in office care, and making custom denture units available at no cost to those at risk of, or experiencing, homelessness..

Those who are most vulnerable to become homeless, including transportation disadvantaged individuals, people with disabilities, seniors and other groups for whom in office visits had been geographically and financially inaccessible receive custom fabricated denture units, manufactured in accordance with an individual treatment plan, as well as referrals to long term oral health resources.

3. Is the agency located within the [Hackett neighborhood](#) (Census Tract 16) or the [Merrill neighborhood](#) (Census Tract 18)?

No

If the agency is not located within the Merrill or Hackett neighborhoods, please thoroughly explain how services are being delivered directly to residents of the NRSA neighborhoods.

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental will supply no-cost, custom fit dentures to residents of the NRSA neighborhoods.

Optional: CBDO Qualifier

Completed by jw@pearltransit.org on 7/6/2023 5:11 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

Optional: CBDO Qualifier

Please provide the following information.

In order for the City to provide funding to an agency for the purpose of carrying out Neighborhood Revitalization Strategy Area (NRSA) CDBG activities, they must qualify as an eligible Community Based Development Organization (CBDO) under 24 CFR 570.204(c).

1. Is your agency an association or corporation organized under state law to engage in community development activities?

No

2. Is the primary purpose of your agency to improve the physical, economic, or social environment of its geographic area of operation by addressing one or more critical problems of the areas, with particular attention to the needs of persons of low and moderate income?

Yes

3. Please provide an explanation of how your agency meets the requirement in #2, and identify any agency documents which support this (e.g. Bylaws, Articles of Incorporation, Mission, etc.). Describe both past experience of how the agency has carried out this purpose in the past, as well as future plans to continue to meet the requirement as described above.

Pearl Transit is a 501(c)(3) entity that currently supplies charitable services ranging from street outreach and non-perishable food box delivery to demand response transportation and travel planning services.

As a federal subrecipient, Pearl Transit has worked with state departments of transportation to implement transit and trip planning services through 5310, as well as the Job Access Reverse Commute (5316) and New Freedom (5317) programs, as well as the Community Development Block Grant Program and the Emergency Solutions Grants Program.

Pearl Transit's mission is to assist every person to break the cycle of homelessness and poverty, to alleviate the underlying causes of poverty, and to enable all of us to attain our fullest potential as individuals and as members of the broader society. We accomplish this mission by providing charitable services ranging from street outreach and non-perishable food box delivery to demand response transportation, oral health outreach, and travel planning services.

In 2022, Pearl Transit supplied more than 6,000,000 rides that connected seniors, consumer participation with disabilities, consumer participation from low income households, and other transit disadvantaged persons with important destinations within their own communities and beyond. Pearl Transit utilized tax deductible charitable donations from employers, businesses, and members of the community to supply more than 3,000,000 reduced and no-fare rides in 2022.

In 2022, Pearl Transit served:

Printed By: [Brian Gile](#) on 8/16/2023

13 of 39

- More than 4,000 consumers whose household income is 200% of Federal Poverty Guidelines or lower
- More than 1,200 people 65 years of age and older, and more than 4,000 disadvantaged people under 65 years of age.

Supporting Documentation (if applicable)

***No files uploaded*

4. Is your agency either a non-profit or for-profit that provides monetary profits to its shareholders or members as an incidental to its operations?

No

5. Does your governing body's membership consist of at least 51% or more of the following:

- low-moderate income residents, owners or
- owners or senior officers of private establishments and other institutions
- or representatives of low-moderate income neighborhood organizations?

***See income limits chart in Appendix A to determine if a member qualifies as a low- to moderate-income (LMI) resident.**

No

Upload a signed Affidavit for each Board member who meets one of the three requirements identified in #5

***No files uploaded*

6. Please confirm the following: Is your organization an agency or instrument of the City of Beloit?

No

7. Does you agency permit more than one-third (1/3) of the governing board to be appointed by or consist of elected or other public officials or employees?

No

8. Does your agency require the members of your governing body to be nominated and approved by the general membership of the organization or by its permanent governing body?

Yes

9. Is your agency subject to requirements under which your assets revert to the recipient upon dissolution?

No

10. Is your agency free to contract for goods and services from vendors of its own choosing?

No



If you answer "No" to any of the above questions, please submit your agency's charter and By-Laws for further review. The City of Beloit may be able to qualify your organization as a CBDO under 24 CFR 270.204(c)(3).

Documentation



By-Laws

pearlbylaws.pdf

G. Funding Priorities

Completed by jw@pearltransit.org on 7/21/2023 1:18 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.

Code Enforcement

Housing Rehabilitation and Development of Affordable Housing

Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)

Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training

Program Administration

Fair Housing

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

According to the Academy of General Dentistry, oral health literacy, lack of affordability, and geographic access are

Printed By: Brian Gile on 8/16/2023

16 of 39

among the foremost barriers to the universal receipt of oral health care. The Academy of General Dentistry (AGD) Barriers and Solutions to Accessing Care.

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide both health and aesthetic benefits for our consumers.

The partnered services of Pearl Transit and Oracle Dental employ state of the art digital technology to address oral health access barriers by eliminating the need for in office care, and making custom denture units available at no cost to low income consumers.

Those who are most vulnerable, including transportation disadvantaged individuals, people with disabilities, seniors and other groups for whom in office visits had been geographically and financially inaccessible receive custom fabricated denture units, manufactured in accordance with an individual treatment plan, as well as referrals to long term oral health resources.

H. Agency Summary

Completed by jw@pearltransit.org on 7/21/2023 1:26 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

Pearl Transit is a 501(c)(3) entity that currently supplies charitable services ranging from street outreach and non-perishable food box delivery to demand response transportation and travel planning services.

As a federal subrecipient, Pearl Transit has worked with state departments of transportation to implement transit and trip planning services through 5310, as well as the Job Access Reverse Commute (5316) and New Freedom (5317) programs, as well as the Community Development Block Grant Program and the Emergency Solutions Grants Program.

In 2022, Pearl Transit supplied more than 6,000,

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

Pearl Transit has partnered with Oracle Dental Laboratories Inc. ("Oracle Dental") to supply no cost full and partial dentures to low income persons in Beloit, including persons experiencing or at risk of homelessness.

Through providing both in home service, as well as street outreach services to unhoused individuals with the use of a mobile, van based dental scanning space, Pearl Transit and Oracle Dental supply no-cost, custom fit dentures that provide the following benefits for our consumers: (1) improving personal appearance, speech, and confidence, (2) providing a restorative option that offers minimal person to person contact and no dentist office visit, (3) encouraging better health by allowing the denture user a range of nutritive foods that they can consume, (4) improving overall oral health by reducing the risk of periodontal disease and tooth decay associated with missing teeth.

Pearl Transit and Oracle Dental's partnered service requires consumers to register for assistance and provide proof of in-state residency in a low income household. Once registered, consumers are scheduled for an in-home or mobile oral scan.

The 3d images captured by Oracle’s dental technician during the mobile visit are processed by scanning software, which then generates an accurate 3D surface model showing the teeth and gingiva’s geometry.

Under the direction of a licensed dentist, a confidential, secure, individualized consumer file and treatment plan are developed for each consumer, which include the 3d image of the consumer’s mouth, as well as consumer demographic information. In accordance with this plan, Oracle Dental custom fabricates complete or partial dentures by means of computer aided design (CAD) and manufacturing (CAM).

Finally, Pearl Transit staff follow up with each consumer helps ensure the best possible long term consumer outcomes, as Pearl Transit staff provide: (1) written and verbal denture and oral care reminders, (2) assess and record remaining consumer needs via standardized questionnaire, (3) provide referrals to a range of community services, including mental health, educational and vocational services providers, as well as low cost dental clinics that will assist each consumer to achieve the best long term oral health.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

The lack of dental benefits available to low-income adults in the United States has been referred to as a “neglected epidemic.” Wallace N. T., Carlson M. J., Mosen D. M., Snyder J. J., Wright B. J. (2011). The individual and program impacts of eliminating Medicaid dental benefits in the Oregon health plan. *American Journal of Public Health* , 101, 2144–2150.. Many states have indicated that adult Medicaid dental benefits will only include “emergency or limited benefits” and only a quarter of states offer comprehensive dental coverage. Nasseh K., Vujicic M., O’Dell A (2013). Affordable Care Act expands dental benefits for children but does not address critical access to dental care issues [Health Policy Resources Center Research Brief].

The interpretation of “emergency benefits” varies widely by state, but generally care is only provided for traumatic injuries or extractions. Kaiser Family Foundation. (2012, June 1). Oral health and low-income nonelderly adults: A review of coverage and access.

According to the Kaiser Family Foundation, “over a third (35 percent) of poor parents and 38 percent of poor adults without children are uninsured.” Majerol M., Vann N., Rachel G (2014). The uninsured: A primer—Key facts about health insurance and the uninsured in America.

As a result of inadequate access, income disadvantaged populations, including those who are experiencing or at risk of homelessness, may experience poor oral health.

Negative oral health consequences are only exacerbated when a person becomes homeless. Homeless persons are 12 times more likely than individuals with stable housing to have dental problems. Persons living in unstable housing, such as a hotel or the residence of a friend or relative, are 6 times more likely to have dental problems. Ferenchick GS. 1992. The medical problems of homeless clinic patients: A comparative study. *Journal of General Internal Medicine*7(3):294–297.

Homeless adults have more intensive dental problems, such as periodontal disease and edentulism (a complete lack of teeth); however, their use of dental services is less than the general population's. U.S. Department of Health and Human Services, Health Resources and Services Administration, Bureau of Primary Health Care. 1998. Specialty care requires creativity and collaboration. *Opening Doors: Information from the Health Care for the Homeless Program*6(2):1–4

Furthermore, only 53 percent of toothless homeless individuals have complete sets of dentures, compared with 91 percent of the general population. Gelberg L, Linn LS, Rosenberg DJ. 1988. Dental health of homeless adults. *Special Care in Dentistry*8(4):167–172.

However the health consequences for low income population extend further. According to the 2000 U.S. Surgeon General's Oral Health Report, poor oral health is linked with "... cardiovascular disease, respiratory infection, and adverse pregnancy outcomes such as preterm birth and low birth weight through bacteria and inflammation." Choi M. K. (2011). The impact of Medicaid insurance coverage on dental service use. *Journal of Health Economics* , 30, 1020–1031.

Additionally, there is a social economic cost of ignoring the oral health needs of income disadvantaged populations. In a study conducted by the University of Minnesota School of Public Health, researchers discovered that in a one-year period dental visits in medical emergency rooms (ERs) cost \$5 million, with public programs reimbursing at 50 percent. Davis E. E., Deinard A. S., Maiga E. W. (2010). Doctor, my tooth hurts: The costs of incomplete dental care in the emergency room. *Journal of Public Health Dentistry* , 703, 205–210.

The high cost of ER care, borne by each state's taxpayers, can be mitigated by improving access to non-emergency oral care for the most vulnerable members of our population, including the income disadvantaged.

Not only does poor oral health care diminish state budgets, it can also contribute to unemployment and, the cycle of poverty. "[A]ccording to the 1996 National Health Interview Survey (NHIS), 1.9 days of work were lost per 100 employed persons over age 18 because of dental symptoms or treatment. Choi M. K. (2011). The impact of Medicaid insurance coverage on dental service use. *Journal of Health Economics* , 30, 1020–1031.

Poor oral health negatively impacts employability. Broken smiles: The impact of untreated dental caries and missing anterior teeth on employment. Yara A. Halasa-Rappel DMD, PhD.

In addition to being viewed as less intelligent, people with missing front teeth are generally viewed as less trustworthy than people with a healthy smile. Newton JT, Prabhu N, Robinson PG. The impact of dental appearance on the appraisal of personal characteristics. *Int J Prosthodont*. 2003; 16(4): 429– 34.

The partnered services of Pearl Transit and Oracle Dental improve the lives of low income and unhoused Beloit residents, which according to 2022 Census data comprise almost 18% of the overall population, by providing no-cost, custom, full and partial denture units that replace missing teeth. Through the artificial restoration of missing teeth, Pearl Transit and Oracle Dental improve consumer aesthetics, increase employability, as well as prevent further deterioration of oral and overall health.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

The partnered services of Pearl Transit and Oracle Dental ensure the availability of sustainable, matching funds, through regular member drives, corporate solicitation, in-kind gifts, special events, and fee-for-service operations.

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

There are no known oral health outreach services currently available to Beloit residents who are low income, homeless, or at risk of homelessness.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

Pearl Transit's community outreach team will work to increase consumer participation through increasing awareness within community resources serving target groups, including Wisconsin Access, as well as providers serving rural residents, people with disabilities, seniors, as well as people at risk of, or experiencing homelessness.

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

The partnered services of Pearl Transit and Oracle Dental recruits consumer participation and secures matching community financial support of its no-cost, custom full and partial dentures for low income, homeless, and at risk of homelessness Beloit residents.

Pearl Transit employs Community Outreach Specialists (COSs), responsible for a portion of its entire service area, that pro-actively perform activities including phone and in-person contact, mail correspondence, and e-mail messaging, designed to communicate the benefits of supporting its local operations to referral sources, including health care

providers, clinics, and organizations serving economically disadvantaged persons.

COSs work to increase consumer participation through increasing awareness within community resources serving target groups, including rural residents, people with disabilities, seniors, as well as people at risk of, or experiencing homelessness.

Each COS's phone, email, and in-person contact with community referral sources attracts new consumer participation. Through performing targeted, regular outreach to every employer and business within

Its service area, Pearl Transit's COSs will attract cash contributions that will be utilized to support its operations.

Further, since Pearl Transit is a 501(c)(3), charitable organization, every dollar contributed to the partnered services of Pearl Transit and Oracle Dental is fully tax deductible, making investment in improved oral health for everyone a cost-neutral, universally beneficial decision for local businesses.

Apart from pro-active community outreach by COSs, Pearl Transit will also utilize the following methods to increase awareness, participation, and tax deductible financial contribution by local residents and businesses:

- Customized roadside and billboard signage;
- Quarterly community fund-raising events that showcase the accomplishments of consumer participation, as well as the cost efficacy of to the partnered services of Pearl Transit and Oracle Dental;
- Google search and social network marketing via Twitter, Facebook and LinkedIn
- Vehicle Branding
- Continuing education training for our COSs on new strategies and best practices
- Print Advertising

I. Project Summary

Completed by jw@pearltransit.org on 7/21/2023 4:23 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

Beloit residents who are low income, homeless, or at risk of experiencing homelessness

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	Task 1: Registration. To receive no-cost custom fabricated dentures, consumers register by completing an application and providing proof of an annual household income equal to or less than 30% of the area median household income (AMI) and residency within Beloit. Unhoused consumers may establish residency and income via certification attesting to their habitation within the state and financial need.	1,300	1,200	\$7,500.00
Q2 4/1/24-6/30/24	Task 2: Service Delivery. Once registration is completed, a trained Oracle dental technician is	1,300	1,200	\$7,500.00

	<p>dispatched to provide in home or mobile dental scanning services. Using a portable, intraoral scanner, a device that is shaped like a large pen, Oracle’s dental technician captures 3d digital dental impressions that include micro-details of the consumer’s mouth in the comfort of the consumer’s own home, or Pearl Transit’s mobile, van based dental scanning space. This digital data, which captures consumer arches, palate, and bite registration, is used to produce a highly detailed image of the consumer’s mouth.</p> <p>The digitized image of each consumer is more accurate than conventional impression taking, requires only a single Oracle technician and consumer visit, and results in improved comfort for consumers. Journal of Clinical and Diagnostic Research. 2019 Apr, Vol-13(4): ZE01-ZE06</p> <p>In contrast to traditional impression techniques, the Pearl Transit’s mobile scanning process performed by Oracle’s dental technician eliminates the need to handle multiple items, including the tray, bite registration waxes, impression materials and any associated appliances. This reduced handling</p>			
--	---	--	--	--

	<p>improves hygiene and reduces the risk of disease transmission.</p> <p>Next, the 3d images captured by Oracle’s dental technician during the mobile visit are processed by scanning software, which then generates an accurate 3D surface model showing the teeth and gingiva’s geometry.</p> <p>Under the direction of a licensed dentist, a confidential, secure, individualized consumer file and treatment plan are developed for each consumer, which include the 3d image of the consumer’s mouth, as well as consumer demographic information. In accordance with this plan, Oracle Dental custom fabricates complete or partial dentures by means of computer aided design (CAD) and manufacturing (CAM).</p> <p>A final denture assembly is fabricated by means of 3D printing and additive manufacturing (AM) including stereolithography.</p> <p>The custom fitted dentures are forwarded to consumers by trackable mail, or are delivered to unhoused consumers by Pearl Transit’s van. At the time of delivery,</p>			
--	--	--	--	--

	consumers are provided written and verbal instructions on denture and general oral care.			
Q3 7/1/24-9/30/24	<p>Task 3: Post Care Followup. Follow up contact occurs at the following two points, and is initiated by Pearl Transit's staff: (1) within 7 days and (2) within three months of denture unit fabrication.</p> <p>Pearl Transit staff follow up with each consumer helps ensure the best possible long term consumer outcomes, as Pearl Transit staff provide: (1) written and verbal denture and oral care reminders, (2) assess and record remaining consumer needs via standardized questionnaire, (3) provide referrals to a range of community services, including mental health, educational and vocational services providers, as well as low cost dental clinics that will assist each consumer to achieve the best long term oral health.</p>	1,300	1,200	\$7,500.00
Q4 10/1/24-12/31/24	<p>Task 3: Post Care Followup. Follow up contact occurs at the following two points, and is initiated by Pearl Transit's staff: (1) within 7 days and (2) within three months of denture unit fabrication.</p> <p>Pearl Transit staff follow up with each consumer helps ensure the best possible long term consumer</p>	1,300	1,200	\$7,500.00

	<p>outcomes, as Pearl Transit staff provide: (1) written and verbal denture and oral care reminders, (2) assess and record remaining consumer needs via standardized questionnaire, (3) provide referrals to a range of community services, including mental health, educational and vocational services providers, as well as low cost dental clinics that will assist each consumer to achieve the best long term oral health.</p>			
				\$30,000.00

I.3. How will you measure the success of the program? (2 points)

The goal of the partnered services of Pearl Transit and Oracle Dental is to improve the lives of low income and unhoused Beloit residents by providing no-cost, custom, full and partial denture units that replace missing teeth.

This artificial restoration of missing teeth, in turn, improves consumer aesthetics, restores sagging facial muscles, fosters the eating and speaking process, and helps prevent further bone degradation.

During the service period, the partnered services of Pearl Transit and Oracle Dental will supply at least 120 partial and 150 full dentures to low income and unhoused Beloit residents, and will help participating residents accomplish the following objectives:

The following will increase among participating Beloit residents: (a) utilization of external low cost dental health alternatives; (b) reported satisfaction levels with the fit and utility of the provided denture units vs. baseline, (c) reported satisfaction levels with the appearance and perceived oral health post care vs. baseline, (d) reported quality of life indicators, such as obtaining or maintaining employment, enrollment or completion of work training, and sustained positive social interactions

The following will decrease among participating Beloit residents: reported dissatisfaction with the appearance and perceived oral health post care vs. baseline.

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

As a federal subrecipient since 2005, Pearl Transit has developed the processes necessary to capture relevant consumer demographic and outcomes data for entry into HMIS. As part of normal service delivery, Pearl Transit will also track consumer outcomes and evaluate participant’ eligibility.

Pearl Transit’s Customer Service Representatives use a standardized case management tool to track consumer outcomes, including progress toward wage self-sufficiency, improved mental and physical health, addictions recovery, and permanent housing. In addition to referrals to services that address the specific health, vocational, educational, and housing needs of each individual, Pearl Transit’s Customer Service Representatives also provide advocacy and application assistance. Pearl Transit provides fare-free long term transportation to enable unsheltered individuals to access the services coordinated on their behalf.

To track each individual’s progress, Outreach Coordinators establish and maintain a confidential electronic case file for every individual served that includes, at minimum, the following: (1) documentation of eligibility, (2) needs assessment and service plan, (3) quarterly case monitoring and planning activities performed in concert with the individual served, (4) individualized, comprehensive housing plan, and (5) expenditures.

In addition to with consumers once per month to assess progress, as well as the need for referral to additional support services, Pearl Transit’s Customer Service Representatives complete case management assessments, which identify individual needs, coordinate services to address the need, and track client progress at the time of initial engagement, at housing entry, and every six months until program discharge. Outreach Coordinators also administer the case management tool 12 months post discharge, when possible, to ensure that the engaged household continues to make progress.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	0	0	0	0	0	0
51-80% CMI	0	0	0	0	0	0
31-50% CMI	17,100	16,490	15,120	14,880	17,500	0
0-31% CMI	16,200	15,780	14,450	13,980	17,000	0

J. Project Budget

Completed by jw@pearltransit.org on 7/21/2023 4:33 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients
Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Supplies for Denture Fabrication, including resin	\$30,000.00
Total	\$30,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be

paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
Total	\$0.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$0.00	\$30,000.00	\$36,000.00
Contributions	\$0.00	\$0.00	\$0.00
Foundations & Venture Grants	\$0.00	\$125,000.00	\$132,000.00
Special Events	\$0.00	\$175,900.00	\$114,000.00
Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00

Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$0.00	\$314,000.00	\$314,000.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$186,000.00	\$186,000.00
Program Service Fees	\$0.00	\$114,500.00	\$119,000.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$0.00	\$0.00	\$0.00
Total Support and Revenue	\$0.00	\$945,400.00	\$901,000.00

Expenses

	Last Year's Actual	Current Year's Budget (\$)	Next Year's Proposed (\$)
--	---------------------------	-----------------------------------	----------------------------------

	(\$)		
Salaries	\$0.00	\$614,000.00	\$625,000.00
Employee Benefits	\$0.00	\$22,000.00	\$29,000.00
Payroll Taxes	\$0.00	\$37,000.00	\$44,000.00
Professional Fees	\$0.00	\$6,200.00	\$0.00
Supplies	\$0.00	\$210,000.00	\$217,000.00
Telephone	\$0.00	\$12,600.00	\$14,200.00
Postage	\$0.00	\$8,600.00	\$9,000.00
Occupancy (building grounds utilities)	\$0.00	\$14,000.00	\$17,000.00
Equipment Rental & Maintenance	\$0.00	\$21,000.00	\$26,000.00
Printing Art Work Publications	\$0.00	\$0.00	\$0.00
Mileage for Staff	\$0.00	\$0.00	\$0.00
Conferences Conventions Meetings	\$0.00	\$0.00	\$0.00
Agency Dues	\$0.00	\$0.00	\$0.00
Awards Grants Individual Assistance	\$0.00	\$0.00	\$0.00
Officers & Directors Liability Insurance	\$0.00	\$0.00	\$0.00
Misc. Expenses (not	\$0.00	\$0.00	\$0.00

otherwise listed)			
Total Expenses (Before Depreciation)	\$0.00	\$945,400.00	\$981,200.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$0.00	\$0.00	\$0.00
Depreciation	\$0.00	\$0.00	\$0.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
-----------------------	--------	---------------------	--

K. Agency Capacity

Completed by jw@pearltransit.org on 7/21/2023 4:35 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

Pearl Transit proposes a new services for Beloit residents.

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

Pearl Transit is a 501(c)(3) entity that currently supplies charitable services ranging from street outreach and non-perishable food box delivery to demand response transportation and travel planning services.

As a federal subrecipient since 2005, Pearl Transit has worked with state departments of transportation to implement transit and trip planning services through 5310, as well as the Job Access Reverse Commute (5316) and New Freedom (5317) programs, as well as the Community Development Block Grant Program and the Emergency Solutions Grants Program.

In 2022, Pearl Transit supplied more than 6,000,000 rides that connected seniors, consumer participation with disabilities, consumer participation from low income households, and other transit disadvantaged persons with important destinations within their own communities and beyond. Pearl Transit utilized tax deductible charitable donations from employers, businesses. and members of the community to supply more than 3,000,000 reduced and no-fare rides in 2022.

In 2022, Pearl Transit served:

- More than 4,000 consumers whose household income is 200% of Federal Poverty Guidelines or lower
- More than 1,200 people 65 years of age and older, and more than 4,000 disadvantaged people under 65 years of age.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

pearlaudit2022.pdf

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

pearlaudit2022.pdf

L. Staffing Capacity

Completed by jw@pearltransit.org on 7/21/2023 4:44 PM

Case Id: 30192

Name: Pearl Transit Corp - 2024

Address: 525 RT 73 North, Suite 104, Marlton, NJ 08053

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

In order to ensure our responsiveness to customer needs, and facilitate a process of continuous improvement, Pearl Transit has implemented a fivepart management plan, which includes:

On-site Manager. Our operations in every community we serve is overseen by an on-site manager.

Regional Vice President (RVP). Michael Fleming, our Regional Vice President, is responsible for mentoring the local management team.

Operations Manager (OM). Jael Watts, our Operations Manager, is responsible for overseeing all aspects of Pearl Transit's operations, including overall operations, technology, sales and marketing, human resources, legal, finance, and accounting.

Operations Staff. We will appoint a local team of seasoned professionals, driving performance excellence by enhancing system efficiency and effectiveness.

On Site Manager, Morgen McClelland

Morgen McClelland contributes more than 28 years of industry experience.

Prior to his current role with Pearl Transit, Morgen served as Area General Manager with an international transit operator. In that position, Morgen oversaw regional transit operations for that provider in California, and managed 17 operations and 33 revenue contracts, 1700 Drivers, 125 Technicians, and 200 Staff and Managers.

Regional Vice President, Michael Fleming

Our Regional Vice President, Michael Fleming, has had more than two decades of transit management experience. In addition to leadership, Michael's experience includes consultancy in such areas as operations, safety and risk management. Michael has served as Pearl Transit's Regional Vice President since 2010.

Operations Manager, Jael Watts

Our Operations Manager, Jael Watts, was one of Pearl Transit's original founders when it began in 2005 as a local

Printed By: [Brian Gile](#) on 8/16/2023

36 of 39

demand response transit provider. Jael's experience includes executive level management and supervisory responsibility in administration, operations, projects, policy and procedure development, budget preparation management and analysis, personnel recruitment, scheduling and development, customer service, maintenance oversight, facility management, safety principles management and troubleshooting. Jael's responsibility for this operation will be to assist and provide necessary support to the Regional Vice President and On Site Manager.

Operations Staff

Pearl Transit will appoint a sufficient number of qualified personnel to operate and maintain its oral health outreach service. The organizational chart below shows the local chain of command.

The responsibilities of paid personnel are as follows:

Operations Manager. Pearl Transit's On-Site Manager will administer, supervise and coordinate the overall activities and functions of the local operations, and will be responsible for effectively providing leadership and direction while complying with various state, federal, and local regulatory laws. Pearl Transit's On-Site Manager will also ensure the efficient utilization of employees, funds, materials, facilities and time, and will oversee Pearl Transit's outreach to community organizations, employers, and business for the purpose of fund raising and referral.

Operations Supervisor. Pearl Transit's Operations Supervisor (OP) will set the direction and priorities of the local operations, with the goal of providing safe, reliable, and efficient service. The OP will also establish annual program goals, objectives and utilization plans, as well as oversee monthly progress assessment efforts. The OP will also monitor consumer engagement, oversee vehicle maintenance programs, ensure compliance with Pearl Transit's policies, and federal and state regulations.

Human Resources. The Human Resources Coordinator (HRC) will implement Pearl Transit's procedures for the recruitment, screening, and placement of both paid and volunteer personnel. The HRC will maintain employment related records, including all those pertaining to pay, benefits, and training. The HRC will also participate in, and manage, Pearl Transit's equal employment, diversity, and anti-harassment initiatives, and will direct disciplinary procedures.

Accounting. Pearl Transit's Accounting Specialist will be responsible for the collection and verification of program data, including ridership, fares, as well as accounts payable and receivable. The Accounting Specialist will also prepare monthly HMIS reports and compile annual statistics.

Customer Service. Pearl Transit's Customer Service Representatives (CSR) will answer email and phone inquiries,

monitor vehicle maintenance, and coordinate preventative vehicle maintenance scheduling. CSRs will also develop and maintain participant records, and verify participant eligibility.

Community Outreach Specialists. Pearl Transit's Community Outreach Specialists (COSs) will work to establish a referral pipeline from community sources to the local operations. COS's primary goal will be to increase participation among low income residents, by seeking the active referral of potential consumers by local agencies serving this demographic, including public assistance and social welfare providers. COSs will communicate with referral and support sources via email, phone, and in person to further Pearl Transit's marketing goals.

Mobile Scan Technician. Pearl Transit's Mobile Scan Technicians take digital impressions in the field, providing every consumer a high quality of care.

Dental Technician. Pearl Transit's Dental Technicians fabricate dentures, in accordance with a dentist-developed, individual consumer treatment plan. Dental Technicians work with digital files, 3D printed models, and dental design software. Maintains equipment and supplies.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

As part of its commitment to fiscal integrity and transparency, Pearl Transit utilizes a comprehensive system for tracking funds, expenses, and disbursements. The following explains the general accounting process, which is accomplished manually and through the use of Peachtree Accounting software:

Daily Processes: Expenditures are documented through cancelled checks, banking statements contracts, travel reports, donor letters, in kind contribution reports, personnel timesheet reports and invoices, and expenses are segregated by program or matching funding source. Total expenditures are tabulated, tracked, and reported to our partners on a daily, monthly, and quarterly basis. Salary expenses for all grant funded positions are tracked and activity reports maintained, which account for all compensated time per position, including time for which reimbursements is not requested because it is spent on activities that are not grant related. Cash receipts are recorded immediately and deposited daily. A petty cash fund is entrusted to Pearl Transit's Administrative Clerk, and is utilized for all payments other than those made by check or credit. Checks to vendors are issued only in payment of approved invoices, and the supporting documents are marked as "paid."

Monthly Processes: All expenses are tracked and balanced. Tabulated expense and fund data is reviewed by the Local Operations Manager. Invoices are prepared based on the reimbursable expenses, which can be allocated to each funder and were paid during the preceding month. Lobbying, fundraising, bad debts, and depreciation are examples of expenses that are not requested to be reimbursed from any grant to which Pearl Transit is a federal subrecipient. In kind contributions of personnel, property, space, or services are valued in accordance with federal cost principles, tracked, and supported by documentation. Bank accounts are reconciled monthly by a third party accounting service.

Quarterly Processes: Tabulated expense and fund data are reviewed by the Board of Directors.

Annual Processes: Prior year expense and fund data is reviewed by the Board of Directors. Subsequent year budgets are developed for all projects. Independent accounting firm is engaged to prepare a financial audit.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

To track each individual's progress, Customer Service Representatives establish and maintain a confidential electronic case file for every individual served that includes, at minimum, the following: (1) documentation of eligibility, (2) needs assessment and service plan, (3) consumer and household demographic information, (4) quarterly case monitoring and planning activities performed in concert with the individual served, (5) individualized, comprehensive housing plan, and (6) expenditures.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Consumers will be required to supply one of the following forms of income proof, establishing household income equal to or less than 50% of the area median household income (AMI):

- Written documentation of head of household's: (1) enrollment in a workforce investment act program, (2) receipt of public assistance benefits, or (3) receipt of Supplemental Security Income (SSI) benefits, OR
- Three consecutive payroll or unemployment check stubs, for every member of the household, showing average monthly income equal to or less than 50% of AMI, OR
- Previous year W-2 form(s), for every member of the household, showing prior year annual income equal to or less than 50% of AMI.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Consumers may provide verification through a recent bill or state-issued identification that they reside within Beloit. Unhoused consumers may establish residency and income via certification attesting to their habitation within the state and financial need.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

No

A. Applicant and Project Information Summary

Case Id: 30184
Name: Wisconsin Women's Business Initiative
Address: 245 Main Street, Racine, WI 53403-1034

Completed by pmetzger@wwbic.com on 7/6/2023 11:31 AM

A. Applicant and Project Information Summary

Please provide the following information.

ORGANIZATION INFORMATION

A.1. Organization or Agency Name

Wisconsin Women's Business Initiative Corporation (WWBIC)

A.2. Organization Address

245 Main Street Racine, WI 53403-1034

A.3. Phone Number

(262) 898-5001

A.4. Fax Number

(262) 925-2855

A.5. Unique Entity Identifier (UEI) #

JAATMXL4V115

A.6. Agency CAGE/SAM #

37WD8

A.7. Executive Director/Chairperson

Wendy K. Baumann

A.8. Email Address

wendy.baumann@wwbic.com

A.9. Legal Status

Private, Non-Profit

A.10. Has this agency received CDBG funding in the past?

Yes

If yes, for approximately how many years?

3

PROJECT INFORMATION

A.11. Project Name

Job Title: BUSINESS OWNER

PRIMARY CONTACT #1

A.12. First Name

Heather

A.13. Last Name

Lux

A.14. Email Address

heather.lux@wwbic.com

A.15. Phone Number

(262) 898-5001

PRIMARY CONTACT #2 (IF APPLICABLE)

A.16. First Name

Kamaljit

A.17. Last Name

Jackson

A.18. Email

kjackson@wwbic.com

A.19. Phone Number

(414) 395-4532

Printed By: Brian Gile on 8/16/2023

B. National Objectives

Completed by pmetzger@wwbic.com on 7/6/2023 11:31 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

B. National Objectives

To be eligible for funding, the project and/or activity you are requesting funding for **must** address **one national objective**.

B.1. The project or activity described in this application directly benefits low- and moderate-income persons. Please check all that apply.

- The project meets the needs of low- and moderate-income persons. At least 51 percent of the participants or beneficiaries of the program must meet the low- and moderate-income guidelines listed in [Appendix A](#).
- The project is located in a low- and moderate-income area. In this case, the project must meet the needs of the residents of one of the areas identified on the map in [Appendix B](#). Typical activities funded are streets improvements, water and sewer lines, parks, and other public facilities.
- The project meets the needs of one of the following specific groups of people (low-mod limited clientele): abused children, elderly persons, battered spouses, homeless persons, severely disabled persons, illiterate adults, persons living with AIDS, and migrant farm workers
- This project provides housing assistance to low- and moderate income households. Fundable activities include housing rehabilitation, acquisition of property for housing, and homeownership assistance.
- This project creates or retains jobs for low- and moderate-income persons.
- The project described eliminates specific instances of blight or physical decay. The only activities to be funded under this category are acquisition, demolition or rehabilitation of buildings.

B.2. Explain how your program will address the national objective checked above.

The Wisconsin Women's Business Initiative Corporation (WWBIC) is a leading, statewide, innovative economic development corporation that is "Putting Dreams to Work" by assisting microenterprises and small businesses. WWBIC is AERIS rated and is one of Wisconsin's first Community Development Financial Institutions (CDFIs). WWBIC opens the doors of opportunity by providing entrepreneurs with access to critical resources including personal financial wellness and business training, one-on-one technical assistance, and responsible lending products. WWBIC focuses on traditionally underserved entrepreneurs including women, people of color, low- to moderate-income individuals, and Veterans.

WWBIC's project Job Title: BUSINESS OWNER aligns perfectly with the national objectives of benefiting low- and moderate-income persons through business startup, strengthening, and expansion to create or retain jobs for low- and moderate-income persons. Job Title: BUSINESS OWNER also aligns with WWBIC's strategic plan to assist businesses in job creation and retention, especially microenterprises.

C. Project Type

Completed by pmetzger@wwbic.com on 7/6/2023 11:32 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

C. Project Type

Please select the type of project you are requesting funding for. **PLEASE ONLY SELECT WHAT IS APPLICABLE TO YOU. DO NOT SELECT BOTH PUBLIC SERVICES AND NO PUBLIC SERVICES**

C.1. **Public Services** – Includes labor, supplies, and materials including but not limited to those concerned with:

Please check all that apply:

- Senior Services
- Handicapped Services
- Youth Services
- Substance Abuse Services
- Legal Services
- Employment Training
- Transportation Services
- Services for Battered and Abused Spouses
- Crime Awareness/Prevention
- Fair Housing Activities
- Tenant/Landlord Counseling
- Child Care Services
- Health Services
- Services for Abused & Neglected Children
- Mental Health Services
- Screening for Lead Poisoning
- Subsistence Payments (one time or short term)

C.2. **Non Public Services** Please check all that apply:

Please check all that apply:

- Housing Rehabilitation – labor, materials, and other costs related to rehabilitating houses
- Property Acquisition – Acquisition of property for any public purpose which meets one of the national objectives
- Demolition – Clearance, demolition, or removal of buildings and improvements, including movement of structures to other sites
- Code Enforcement – Costs incurred for inspection of code violations and enforcement of codes in deteriorating or deteriorated areas
- Commercial or Industrial Rehabilitation – The acquisition, construction, rehabilitation or installation of commercial or industrial buildings, structures, and other real property equipment and improvements, including railroad spurs or similar extensions.
- Micro-enterprise Assistance – The provision of assistance to businesses having five or fewer employees, including the owner.
- Planning – Costs of data gathering, studies, analysis, and preparation of plans and the identification of actions that will implement such plans
- Public Facilities and Improvements – Acquisition, construction, reconstruction, rehabilitation, or

Printed By: Brian Gile on 8/16/2023

5 of 31

emergency payments on behalf of clients.)

- Homeownership Assistance (not direct)
- Rental Housing Subsidies
- Security Deposits
- Housing Counseling Only
- Neighborhood Cleanups
- Food Banks
- Other Public Services

Briefly explain how your Public Services project proposed project fits into the category selected above (if not applicable, enter n/a)

n/a

installation of public facilities and improvements

- Special Economic Development Activities – Provision of assistance to a private, for-profit business and economic development services
- Fair Housing – Provision of fair housing service and fair housing enforcement, education, and outreach.

Briefly explain how your proposed Non Public Services project fits into the category selected above (if not applicable, enter n/a)

WWBIC's Job Title: BUSINESS OWNER project is centered on provision of technical assistance (1:1 counseling, entrepreneurship and business training) to microenterprise businesses. All of our economic development services are provided only to private, for-profit businesses.

D. Consolidated Plan Goal

Completed by pmetzger@wwbic.com on 7/6/2023 11:32 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

D. Consolidated Plan Goal

Please provide the following information.

D.1. What Consolidated Plan goal does this project meet? (Check all that apply)

- Affordable Housing
- Homeless Services
- Comprehensive Case Management and Services
- Future Ready Skill Training
- Improve Housing Stock
- Economic Development

D.2. Explain how your proposed program/project will address the Consolidated Plan goal checked above.

WWBIC's Job Title: BUSINESS OWNER project will serve microentrepreneurs and potential microentrepreneurs; focusing on low- to moderate-income entrepreneurs and potential entrepreneurs. At least 51% of those served will be low- to moderate-income. WWBIC will define LMI using the income limits found in Appendix A. Individuals served will self-report household income and number in household at the time of their WWBIC service. Owners of microenterprises served will report on the wages of their employees.

E. Conflict of Interest

Completed by pmetzger@wwbic.com on 7/6/2023 11:32 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

E. Conflict of Interest

Please provide the following information.

E.1 Have any current City of Beloit Community Development Authority (CDA) members or City Councilors served on any boards or committees for the applicant agency since May 31, 2022?

No

F. Required Documentation

Completed by pmetzger@wwbic.com on 7/6/2023 11:45 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

F. Required Documentation

Attach the following information to your application. Incomplete information will result in your application not being considered.

Documentation

List of the Board of Directors – Include only one copy

*A list of the current board of directors or other governing body of the agency must be submitted. The list must identify the principal officers of the governing body, name, professional contact information for board purposes including telephone number, address, and occupation or affiliation of each member. *Required*

2024 City of Beloit CDBG PreApplication WWBIC Board Members.pdf

Articles of Incorporation– Include only one copy

*Articles of incorporation are the documents recognized by the State as formally establishing a private corporation, business or agency. *Required*

WWBIC Articles of Incorporation.pdf

Non-profit Determination – Include only one copy

*Non-profit organizations must submit tax-exemption determination letter from the Federal Internal Revenue Service and WI Department of Revenue (Certificate of Exempt Status). *Required*

WWBIC IRS 501c3.pdf

Authorization to Request Funds – Include only one copy

Documentation must be submitted of the governing body's authorization to submit the funding request.

*Documentation of this requirement consists of a copy of the minutes of the meeting in which the governing body's resolution, motion or other official action is recorded. *Required*

WWBIC Board of Directors Meeting Minutes 12212022.pdf

Designation of Authorized Official – Include only one copy

Documentation must be submitted of the governing body's action authorizing the representative of the agency to negotiate for and contractually bind the agency. Documentation of this requirement consists of a signed letter from

Printed By: Brian Gile on 8/16/2023

9 of 31

*the Chairperson of the governing body providing the name, title, address and telephone number of each authorized individual. *Required*

WWBIC Signed Authorization Chairperson WKB 2023.pdf

Organizational Chart – Include only one copy

*An organizational chart must be provided that describes the agency’s administrative framework and staff positions, indicates where the project fits into the organizational structure, and identifies any staff positions for administration of the project. *Required*

20230705.Comprehensive Organization Chart.pdf

Audit

Attach a copy of your latest audit or financial review if one was completed. (Include only one copy).

WWBIC - 2022 Audited Financial Statements.pdf

G. Funding Priorities

Completed by pmetzger@wwbic.com on 8/15/2023 11:05 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

G. Funding Priorities

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

The City of Beloit Community Development Authority (CDA) and City Council approved the following funding priorities for 2023 CDBG funds. *The updated NRSA Plan is available on the City's website at <https://www.beloitwi.gov/> under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.1. Select the funding priority that your project will meet:

- Public Service Programs which focus on comprehensive case management strategies (that offer advocacy as well), with priority given to neighborhood stabilization activities, housing assistance, education in life skills and financial management, assistance in obtaining jobs in the health care industry or teaching profession, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, mental health, youth and young adult programming, and activities which meet one of the Neighborhood Revitalization Strategy Areas (NRSA) objectives listed below.**
- Code Enforcement**
- Housing Rehabilitation and Development of Affordable Housing**
- Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)**
- Economic Development Activities with priority given to Small Business, Entrepreneur, and Microenterprise Assistance and Technical Job Training**
- Program Administration**
- Fair Housing**

*The updated NRSA Plan is available on the City's website at www.beloitwi.gov under Departments, Community Development. It is also available for viewing at City Hall, 100 State Street, Third Floor, in the Community Development Department, and at the Beloit Public Library.

G.2. Explain how your proposed program/project will address the funding priority checked above.

The Wisconsin Women's Business Initiative Corporation (WWBIC) is a leading, innovative, statewide economic

development corporation that is “Putting Dreams to Work” by assisting microenterprises and small businesses. WWBIC’s Job Title: BUSINESS OWNER program aligns with the Economic Development Activities priority as it provides training and technical assistance for current and potential microentrepreneurs and small business owners. Through this training and technical assistance, along with additional WWBIC supports including personal financial wellness training and access to capital, WWBIC small business owners and microentrepreneurs start, strengthen, and expand their businesses to create or retain jobs for low- to moderate-income City of Beloit residents.

H. Agency Summary

Completed by pmetzger@wwbic.com on 8/15/2023 11:05 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

H. Agency Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

H.1. Briefly describe your agency. Include the length of time your agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. (2 points)

WWBIC was incorporated as a 501(c)3 corporation on October 8, 1987 and was born out of the women's economic empowerment movement. WWBIC focuses on providing training, technical assistance, and access to capital for traditionally underserved entrepreneurs including women, people of color, low- to moderate-income individuals, and Veterans. Since 1987, WWBIC has served 72,709 individuals and loaned over \$107M to small business owners; who in turn have started, strengthened, or expanded 9,009 small businesses creating/retaining 18,027 jobs.

H.2. Summarize the project for which you are requesting funding. What services will be provided with CDBG funding? (2 points)

WWBIC's Job Title: BUSINESS OWNER is designed to provide training for entrepreneurs and potential entrepreneurs at each phase of their journey; from creating a business plan to learning about financial management, operations, marketing and other aspects of starting/running a successful business; to navigating certification processes and accessing capital. WWBIC's personal financial wellness programs are also a mechanism for Wisconsin residents to create financial stability, even if they decide to not pursue entrepreneurship. Personal financial wellness training includes credit recovery; personal and household budgeting; understanding student loan debt; managing tax debt; accessing homebuying grants and down payment assistance; understanding life insurance; how to avoid predatory lending and knowing your rights as a borrower; how to rebuild after a foreclosure/bankruptcy; and how to plan for retirement.

WWBIC's extremely pro-active model for providing technical assistance to our loan clients mitigates the risk of lending to traditionally unbankable borrowers. Technical assistance is provided to WWBIC clients both during pre-loan and post-loan close. Pre-loan technical assistance includes business plan creation and cashflow projections, operations, marketing, and other aspects of starting and running a successful business. Post-loan close technical assistance is provided throughout the life of a WWBIC loan via a WWBIC Small Business Consultant (SBC) who meets with the business owner on a regular basis, and provides technical assistance including financial projections and cash flow, marketing, social media, access to additional capital, and referrals to additional resources and networks. WWBIC also provides a year of credit recovery services for first time entrepreneurs to ensure that their personal credit score is not negatively affected by a business loan and ensuring that both their personal and business credit scores are strengthened; leading to better generational wealth building via entrepreneurship. WWBIC also has a volunteer corps 200+ strong that includes experts in law, finance, and other business operations that assist WWBIC clients on specific business issues.

WWBIC has lending options available from \$1,000 to \$350,000 with APRs ranging from 5% to 10% for startups and

Printed By: Brian Gile on 8/16/2023

13 of 31

existing businesses; as well as crowdfunded no-interest no-fee loans through Kiva@WWBIC. WWBIC loans can be used for starting or expanding a business, purchase or repair of machinery or equipment, furniture and fixtures, inventory, supplies, and working capital.

WWBIC also provides access to professional business networks and partners including Chambers of Commerce, the Small Business Administration Service Corps of Retired Executives (SBA SCORE), Community Action Agencies, Small Business Development Centers (SBDC) hosted by the University of Wisconsin System, technical colleges and other post-secondary education institutions, and local government entities.

H.3. Describe the need for the proposed program or services, and provide documentation to demonstrate this local need (including demographic, socio-demographic, and economic evidence that supports your claims). (2 points)

Of all enterprises operating in the State of Wisconsin, 51% are microenterprises; however, Beloit lags behind this percentage with less than half of the enterprises operating in the City of Beloit being microenterprises (2021 County Business Patterns, U.S. Census Bureau). Beloit's disparities in business ownership also extend to minority-owned businesses, with only 3.6% of all Beloit businesses being owned by minorities; compared to 6.9% of all Wisconsin businesses being owned by minorities (2020 Owner Characteristics of Employer Firms, Annual Business Survey, U.S. Census Bureau). Furthermore, a 2022 report by the Joint Center for Political and Economic Studies showed that 70% of entrepreneurs of color or those considering becoming an entrepreneur expressed challenges with accessing trustworthy mentoring, training, and technical assistance for starting, strengthening, or expanding their small businesses, as compared to less than half of their white counterparts (2022 Joint Center for Political and Economic Studies, Exploring Challenges for Small-Business Owners Across Race). To close these gaps in small business ownership, WWBIC targets its services to these traditionally underserved populations, including entrepreneurs of color, women, Veterans, and low- to moderate-income residents.

H.4. Has the program proposed for funding expanded or improved in the past twelve (12) months? Describe any changes in agency capacity and/or services. (2 points)

WWBIC now provides startup entrepreneurs with one year of credit recovery services. WWBIC's credit recovery services and training enhance the entrepreneurship training to entrepreneurs in not only understanding their credit score, but going deeper in ensuring that they understand the holistic nature of credit and their buying power that is tied to this credit. WWBIC walks alongside the entrepreneur for a full year during their credit recovery journey; teaching and guiding to ensure sustainability and independence to tackle credit issues, should any arise in the future. WWBIC's holistic model of entrepreneur support is unique in ensuring that credit is not temporarily "repaired," but that entrepreneurs understand the power of credit, and training them to understand credit and how to keep their recovered credit in excellent status.

WWBIC clients are supported for one full year of credit recovery through certified credit counselors who are teaching and educating on how credit scores, product mixtures, and credit histories inform this score. WWBIC's combination of training, credit recovery, and one-on-one financial counseling allows for greater long-term success for personal financial wellness and building generational wealth. Financial wellness and wealth accumulation is transformative across households and generations; it supports economic mobility and helps solidify a household's social, political, and economic status. WWBIC especially focuses on Black and Hispanic households who persistently are over-represented at the bottom of socioeconomic distribution (March 2022, Racial Disparities in Household Wealth Following the Great Recession, UW-Madison Institute for Research on Poverty).

H.5. How is your program unique to the City of Beloit? Are any services duplicated or similar to other services already provided in the community? If yes, explain how your agency will collaborate with other agencies providing similar services to ensure efficient, unduplicated delivery of services. (2 points)

WWBIC's services are unique to the City of Beloit as we are the only entity providing a one stop shop for current and potential entrepreneurs including training, technical assistance, and access to responsible capital. Through WWBIC's mission of serving traditionally underserved entrepreneurs and potential entrepreneurs (women, people of color, low- to moderate-income individuals, Veterans), we are committed to economic diversity and inclusion.

H.6. What other agencies (within the City of Beloit and Rock County) does your agency work closely with to serve clients? (2 points)

WWBIC will continue to work closely with the City of Beloit, the Director of City Development, and the Greater Beloit Economic Development Corporation; we will continue to work collaboratively with the Beloit Chamber of Commerce and the Downtown Beloit Association. We will continue our partnership with Rock County Jump Start, which provides education, tools and resources for Black entrepreneurs to start, grow and sustain successful businesses in Rock County.

WWBIC also relies on partners who assist us in providing outreach to underserved populations and hosting WWBIC training events including:

- Downtown Beloit Association
- Beloit Chamber of Commerce
- Beloit Public Library
- YWCA Rock County
- Wisconsin Contigo Small Business
- Stateline Literacy Council
- New York Life
- Black Hawk Bank

H.7. How will the applicant inform the community about services to be provided by the proposed program? Include details regarding targeted outreach to Beloit's low and moderate income (LMI) households/residents. (2 points)

WWBIC has developed outreach and marketing systems to reach current and prospective clients. Our focus is on mediums where women, lower wealth, people of color, and Veterans will have fair and equitable access to WWBIC services. WWBIC's first outreach is generally organic word of mouth and then via social media platforms as the next strongest means of outreach.

WWBIC promotes its activities through email, Constant Contact, key partner relationships, training and lending catalog circulation, flyers, social media, local print and electronic media outlets, and outreach in the community. Partners and volunteers distribute WWBIC's training and lending catalogs, flyers, and materials on a regular basis and often serve as a host for classes. These partners include financial institutions, private foundations, corporations, neighborhood groups, libraries, Chambers of Commerce, elected officials, and regional Advisory Council members.

WWBIC's marketing and training materials are provided in both English and Spanish. WWBIC trainings are held in accessible areas as well online and on demand for increased virtual accessibility.

WWBIC's outreach partners that assist us in reaching LMI Beloit residents are listed in H.6.

I. Project Summary

Completed by pmetzger@wwbic.com on 8/15/2023 11:08 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

I. Project Summary

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

I.1. Specify the population to be served by this proposal. Provide a brief description of the anticipated recipients including age, ethnicity, gender, and any other relevant characteristics. (2 points)

This program will be aimed at creating/retaining jobs for low- to moderate-income individuals through the promotion of small business/microenterprise creation/strengthening. Historically, WWBIC has focused on women, people of color, lower-wealth individuals, and Veterans. This program will focus on the City of Beloit's CDBG residency and income requirements for those clients served. In 2022, our City of Beloit client demographics were 90% low- to moderate-income; 86% non-white (including 76% Hispanic/Latino); and 76% women.

I.2. Complete the table below to indicate how the program will accomplish the objectives and fully expend the funds. (2 points)

Dates	Services to be provided	Estimated Number of Individuals to be Served	Estimated Number of Households to be Served	Budget Per Quarter
Q1 1/1/24-3/31-24	1:1 Business Assistance through WWBIC Small Business consultants, volunteer coaches and mentors, Kiva, WWBIC Initiate Portal (online interactive coaching), Spanish/English bilingual/bicultural staff, and WWBIC online and in-person business training. Access to WWBIC capital, including WWBIC City of Beloit Revolving Loan Fund. Each loan from the WWBIC City of Beloit Revolving Loan Fund will create or retain at least 1 LMI FTE job.	7	7	\$12,500.00
Q2 4/1/24-	1:1 Business Assistance	8	8	\$12,500.00

6/30/24	through WWBIC Small Business consultants, volunteer coaches and mentors, Kiva, WWBIC Initiate Portal (online interactive coaching), Spanish/English bilingual/bicultural staff, and WWBIC online and in-person business training. Access to WWBIC capital, including WWBIC City of Beloit Revolving Loan Fund. Each loan from the WWBIC City of Beloit Revolving Loan Fund will create or retain at least 1 LMI FTE job.			
Q3 7/1/24-9/30/24	1:1 Business Assistance through WWBIC Small Business consultants, volunteer coaches and mentors, Kiva, WWBIC Initiate Portal (online interactive coaching), Spanish/English bilingual/bicultural staff, and WWBIC online and in-person business training. Access to WWBIC capital, including WWBIC City of Beloit Revolving Loan Fund. Each loan from the WWBIC City of Beloit Revolving Loan Fund will create or retain at least 1 LMI FTE job.	8	8	\$12,500.00
Q4 10/1/24-12/31/24	1:1 Business Assistance through WWBIC Small Business consultants, volunteer coaches and mentors, Kiva, WWBIC Initiate Portal (online interactive coaching), Spanish/English bilingual/bicultural staff, and WWBIC online and in-	7	7	\$12,500.00

	person business training. Access to WWBIC capital, including WWBIC City of Beloit Revolving Loan Fund. Each loan from the WWBIC City of Beloit Revolving Loan Fund will create or retain at least 1 LMI FTE job.			
				\$50,000.00

I.3. How will you measure the success of the program? (2 points)

WWBIC’s measure of success is through the number of clients, entrepreneurs, and potential entrepreneurs who are receiving training and technical assistance; as well as through the number of businesses started or strengthened. WWBIC’s objectives for activities funded with this proposal and with additional funds leveraged with a grant from City of Beloit CDBG are as follows:

- 30 City of Beloit residents receive WWBIC services including training, technical assistance, and/or lending
- 51% of clients served will be low-to-moderate income
- 60% of clients served will be women and/or people of color
- Through access to the City of Beloit Revolving Loan Fund; small businesses or microenterprises will be able to create or retain a total of 4 FTEs

I.4. Describe how you will provide ongoing case management to the clients served by the proposed program. (2 points)

WWBIC’s Regional Directors and Small Business Consultants (SBCs) work directly with clients throughout their time with WWBIC as they go through training, technical assistance, and/or lending. Technical assistance is provided to WWBIC clients both during pre-loan and post-loan close. Pre-loan technical assistance includes business plan creation and cashflow projections, operations, marketing, and other aspects of starting and running a successful business. Post-loan close technical assistance is provided throughout the life of a WWBIC loan via a WWBIC Small Business Consultant (SBC) who meets with the business owner on a regular basis, and provides technical assistance including financial projections and cash flow, marketing, social media, access to additional capital, and referrals to additional resources and networks.

I.5. Provide the following data on the number of individuals AND Households served by the program. (2 points)

Income Level	2022 Individuals Served	2022 Households Served	2023 Individuals Served to Date	2023 Households Served to Date	2024 Estimated Individuals Served	2024 Estimated Households Served
81-100% CMI	3	3	5	5	3	3
51-80% CMI	8	8	3	3	8	8
31-50% CMI	9	9	3	3	9	9
0-31% CMI	11	11	2	2	10	10

--	--	--	--	--	--	--

J. Project Budget

Completed by pmetzger@wwbic.com on 8/15/2023 11:09 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

J. Project Budget

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

It is important to note that CDBG awards can only be utilized for the following expenses:

1. Direct Program Expenses (i.e. – Emergency Rental Assistance)
2. Direct Wages/Salaries/Fringes for Staff working directly with CDBG eligible clients Ineligible Expenses include, but are not limited to:

1. Indirect allocation (telephone, internet, rent, general office supplies, etc.)
2. Subscription services, equipment rental and/or repair, etc.

If your agency has any inquiries regarding eligible expenses, please contact Megan McBride (608) 364-6738 or mcbriDEM@beloitwi.gov before submitting the application.

J.1. Use the table below to show how you propose to use 2024 CDBG funds for this project. Total must match total request for 2024 CDBG. (2 points)

Type of Expenditure	Budget
Salaries	\$13,820.00
Payroll Taxes	\$1,057.00
Employee Benefits	\$2,963.00
WWBIC City of Beloit Revolving Loan Fund Capital	\$30,000.00

City of Beloit Public Library Office Space Rental	\$2,160.00
Total	\$50,000.00

J.2. Please provide the following information for each staff person working directly with CDBG clients to be paid out of CDBG: (2 points)

Name	Title	Total Annual Salary	Total Annual Benefit Costs
Heather Lux	Regional Director	\$107,384.00	30570
Christina Padilla	Office Coordinator	\$38,064.00	12515
Keydi Bognar	Bilingual Outreach Specialist	\$26,608.00	7105
Jenn Ring	Small Business Consultant	\$53,045.00	15663
Isabella Sgriccia	Kiva Capital Access Manager	\$31,200.00	8800
Jack Warrick	Associate Loan Officer	\$55,130.00	17722
Grace Bruce	Loan Services Specialist	\$43,472.00	12515
Joseph Mutz	Accounting	\$67,853.00	19403

	Manager		
--	---------	--	--

J.3. Provide detail on the remaining budget items:

Type of Expenditure	Proposed Allocation
WWBIC City of Beloit Revolving Loan Fund Capital	\$30,000.00
City of Beloit Public Library Office Space Rental	\$2,160.00
Total	\$32,160.00

J.4. Please provide the budget for the ENTIRE PROGRAM in the box below. Include CDBG and ALL OTHER sources of revenue for the program.

Support and Revenue

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Community Development Block Grant (CDBG)	\$100,000.00	\$0.00	\$50,000.00
Contributions	\$139,168.00	\$139,168.00	\$142,446.00
Foundations & Venture Grants	\$186,686.00	\$186,686.00	\$191,083.00
Special Events	\$0.00	\$0.00	\$0.00

Legacies & Bequests (unrestricted)	\$0.00	\$0.00	\$0.00
Collected through local member units	\$0.00	\$0.00	\$0.00
Contributed by Assoc. Organizations	\$0.00	\$0.00	\$0.00
Other Government Fees & Grants	\$400,000.00	\$402,000.00	\$411,400.00
Blackhawk Region United Way	\$0.00	\$0.00	\$0.00
All other United Ways	\$0.00	\$0.00	\$0.00
Membership Dues	\$0.00	\$0.00	\$0.00
Program Service Fees	\$621,930.00	\$630,000.00	\$630,000.00
Sales-Materials	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00
Sales to the Public/Product Sales	\$0.00	\$0.00	\$0.00
Investment Income	\$0.00	\$0.00	\$0.00
Misc. Revenue (not otherwise listed)	\$175,000.00	\$175,000.00	\$175,000.00

Total Support and Revenue	\$1,622,784.00	\$1,532,854.00	\$1,599,929.00
---------------------------	----------------	----------------	----------------

Expenses

	Last Year's Actual (\$)	Current Year's Budget (\$)	Next Year's Proposed (\$)
Salaries	\$773,048.00	\$796,239.00	\$820,126.00
Employee Benefits	\$162,340.00	\$167,210.00	\$172,226.00
Payroll Taxes	\$58,752.00	\$60,514.00	\$62,330.00
Professional Fees	\$38,837.00	\$36,467.00	\$39,000.00
Supplies	\$9,459.00	\$9,500.00	\$9,500.00
Telephone	\$22,193.00	\$21,985.00	\$22,000.00
Postage	\$3,699.00	\$3,698.00	\$3,700.00
Occupancy (building grounds utilities)	\$83,223.00	\$83,223.00	\$85,383.00
Equipment Rental & Maintenance	\$9,247.00	\$9,160.00	\$9,200.00
Printing Art Work Publications	\$14,795.00	\$12,822.00	\$13,000.00
Mileage for Staff	\$9,247.00	\$9,160.00	\$9,200.00
Conferences Conventions	\$12,945.00	\$12,820.00	\$13,000.00

Meetings			
Agency Dues	\$8,555.00	\$9,250.00	\$9,250.00
Awards Grants Individual Assistance	\$89,050.00	\$89,050.00	\$89,050.00
Officers & Directors Liability Insurance	\$13,738.00	\$13,738.00	\$13,738.00
Misc. Expenses (not otherwise listed)	\$46,528.00	\$195,479.00	\$229,226.00
Total Expenses (Before Depreciation)	\$1,355,656.00	\$1,530,315.00	\$1,599,929.00

	LAST YEAR'S ACTUAL (\$)	CURRENT YEAR'S BUDGET (\$)	NEXT YEAR'S PROPOSED (\$)
(Deficit) or Excess (Revenue - Expenses)	\$267,128.00	\$2,539.00	\$0.00
Depreciation	\$5,277.00	\$5,000.00	\$5,000.00
Payment to National Organization	\$0.00	\$0.00	\$0.00

J.5. Provide detail on Federal Funding **Excluding City of Beloit CDBG awards:**

Type of Federal Grant	Amount	# of Years Received	Findings resulting in the loss of the funding?
Small Business Administration Office of Women's Business Ownership (SBA OWBO)	\$150,000.00	32	N/A
Small Business Administration Microloan	\$80,282.00	16	N/A
Small Business Administration PRIME	\$40,000.00	21	N/A

K. Agency Capacity

Completed by pmetzger@wwbic.com on 8/15/2023 11:09 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

K. Agency Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

K.1. For how many years has the agency requesting funding provided services to the Beloit community? (2 points)

16

K.2. How many years of experience does the applicant have with administering federal or state grant awards? Please describe the type of grant funds received, and number of years funding has been received. If the agency does not have experience administering federal or state grant awards, explain how the agency will ensure compliance with CDBG program requirements. (2 points)

WWBIC has 36 years of experience with administering federal and/or state grant awards. WWBIC has received grants from and has been audited, tested, and found satisfactory or exemplary by the U.S. Small Business Administration, the U.S. Department of Agriculture, U.S. Housing and Urban Development, the U.S. Department of Agriculture, the U.S. Department of Treasury, State of Wisconsin Department of Administration, and 12 Wisconsin CDBG municipal programs. WWBIC's 2022 Audited Financial Statements were completed by RitzHolman LLP and for the ninth consecutive year, WWBIC had no issues that required a management letter.

K.3. Has the agency had any findings or concerns related to a financial audit or grant monitoring resulting in loss of funding in the past 5 years? If yes, explain and provide documentation that findings or concerns have been resolved. (2 points)

No

Audit Documents

***No files uploaded*

K.4. Has the applicant received any citizen complaints or negative media exposure in the past three (3) years? If yes, explain and provide documentation that complaints have been resolved. (2 points)

No

Citizen Complaints/Negative Media Exposure

***No files uploaded*

L. Staffing Capacity

Completed by pmetzger@wwbic.com on 8/15/2023 11:10 AM

Case Id: 30184

Name: Wisconsin Women's Business Initiative

Address: 245 Main Street, Racine, WI 53403-1034

L. Staffing Capacity

Please provide the following information.

Municipal Department Projects please select **Complete & Continue** to complete and submit your application.

Private, Non-Profit organizations please complete this section in its entirety.

L.1. Identify agency staff that will be responsible to oversee implementation of this program, provide required reporting, and oversee all aspects of the program to completion. (2 points)

Heather Lux, Regional Director for Southeast Wisconsin, will oversee the day-to-day operation and implementation of this program. She has been with WWBIC since 2008 and has 18 years of nonprofit community service experience. Heather holds a Business Administration/Public Relations degree from Carthage College.

Christina Padillia, Office Coordinator, will support office administration, programming, and event support for this program. She has been with WWBIC since 2021 and is also a small business owner. Christina holds a Technical Diploma in Business Administration and Management from Gateway Technical College.

Keydi Bognar, Bilingual Outreach Specialist, will provide outreach and support to current and potential Hispanic/Spanish Speaking entrepreneurs for this program. She has been with WWBIC since 2023 and has significant experience in the credit union industry. Keydi holds a Marketing Associates Degree from Gateway Technical College.

Jenn Ring, Small Business Consultant, will provide one-on-one technical assistance to current and potential small business owners and microentrepreneurs. She has been with WWBIC since 2000 in training and technical assistance capacities. In addition to being a small business owner, she holds a Bachelors of Science in Administration from Winona State University as well as Liveplan Strategic Advisor Certification, Nxlevel Facilitator Certification, BACOM Beginner-Advanced Business Assessment Certification, and National Development Council Business Assistance Certification. Isabella Sgriccia, Kiva Capital Access Manager, will provide Kiva@WWBIC assistance to entrepreneurs who qualify for Kiva@WWBIC's crowdfunded no-interest microloans, including Latino/Spanish-speaking entrepreneurs. She has been with WWBIC since 2023 and has experience in nonprofit and higher education industries. Isabella holds a Bachelor of Arts in Economics from Lawrence University and a International Baccalaureate Diploma from Cairo American College.

Jack Warrick, Associate Loan Officer, will provide pre-loan and lending technical assistance to entrepreneurs who qualify for a WWBIC loan. He has been with WWBIC since 2020 in lending and credit roles. Jack holds a Bachelor of Science: Business Marketing & Management from Edgewood College.

Grace Bruce, Loan Services Specialist, will provide loan serving to borrowers in this program. She has been with WWBIC since 2018 and has significant experience in the banking industry. She holds a Certification from the American Institute of Banking.

Joseph Mutz, Accounting Manager, will oversee the fiscal management of an investment from the City of Beloit CDBG.

Printed By: Brian Gile on 8/16/2023

28 of 31

He has been with WWBIC since 2012 and has significant experience in nonprofit and CDBG fiscal management. He holds a Bachelors in Accounting from Lakeland College.

Kevin Vang, Client Data Analyst, will oversee the data collection and recording of clients served in this program. He has been with WWBIC since 2017 and has significant experience in data collection, management, and reporting. Kevin holds a Bachelors Degree in Computer Science from Cardinal Stritch University.

Callan Lindbloom, Compliance Specialist, will oversee the programmatic reporting to the City of Beloit CDBG. They have been with WWBIC since 2023 and has experience in client data collection and reporting. Callan holds a Bachelors of Arts from Carthage College.

WWBIC's Executive Leadership Team has significant experience in economic development, program oversight, and strategic leadership. Members of this team include:

Wendy K. Baumann, President and Chief Visionary Officer. Wendy has been with WWBIC since 1994, providing the leadership required to ensure the achievement of WWBIC's mission and to upload the philosophy of serving businesses owned by women, minorities, and low wealth individuals in Wisconsin. She holds a Masters and Baccalaureate from the University of Wisconsin-Milwaukee. She was honored by UW-Milwaukee as the Graduate of the Last Decade in 1998, Professional Dimension's Sacajawea Award in 2014, BizTimes Media's Woman Executive of the Year in 2017, Association for Enterprise Opportunity's Impact Award for Innovation on Main Street in 2022, and was named as one of Wisconsin's 275 Most Influential Business Leaders by BizTimes Media in 2022.

Dr. Kamaljit Jackson, PhD., Vice President for Programs and Operations oversees all of WWBIC's core programming and operations across the State of Wisconsin. Kamaljit has been with WWBIC since 2019 and has significant experience in the nonprofit and education arenas. She holds a Bachelors in Business Administration from Cardinal Stritch, an MBA from UW-Parkside, and a Ph.D. in Organizational Development from Benedictine University. She is a certified Lean Six Sigma Black Belt.

Jon Gaines, CPA, CGMA, MBA, Vice President of Business Services and Finance is responsible for all aspects of WWBIC's financial and accounting operations, office administration, human resources, and information management. He has been with WWBIC since 2010 and has over 25 years of finance and accounting experience. Jon holds a Bachelors of Science from St. Augustine University and an MBA from the University of Wisconsin-Milwaukee. Jon is a member of the Greater Milwaukee Chapter of the National Association of Black Accountants and the Wisconsin Institute of Certified Public Accountants Education Foundation.

Christina Knudsen, MEPD, Vice President of Development and Communications is responsible for overseeing WWBIC's development, grant compliance, strategic plan management, and communications/marketing functions. She fosters relationships and programs to increase WWBIC's visibility, funder engagement, financial resources, and brand awareness. She has been in non-profit organization management for over 25 years. She is skilled in Project Management, Special Events, Donor Relations, Solicitation, Philanthropy, Major Gifts, Public Relations, and Marketing. Christina is a strong community and social services professional with a Masters of Education in Professional Development focused in Education from University of Wisconsin-La Crosse and also has earned a Bachelor of Science in Business Administration with an emphasis in Marketing.

L.2. Describe your financial management department and any relevant experience in administering federal grant funds. (2 points)

WWBIC uses Abila Financial Accounting software to track and report on the uses of funds from public and private

sources. Abila allows WWBIC to create separate departments within the general ledger to assign revenues to their appropriate use. Tracking revenues and expenses by funding sources facilitates grants management and reporting to funders. WWBIC also uses Abila to manage cash receipts, disbursements, and general ledger functions. Payroll is processed by an outside vendor, Paylocity, to ensure that employee time is properly allocated. Abila produces all reports categorized by funds. Subsidiary ledgers are reconciled to the general ledger using transaction summary reports. The general ledger trial balance is reconciled monthly in the preparation of monthly financial statements. Automated accounting, client tracking, and portfolio management systems are backed up daily.

WWBIC has 36 years of experience with administering federal and/or state grant awards. WWBIC has received grants from and has been audited, tested, and found satisfactory or exemplary by the U.S. Small Business Administration, the U.S. Department of Agriculture, U.S. Housing and Urban Development, the U.S. Department of Agriculture, the U.S. Department of Treasury, State of Wisconsin Department of Administration, and 12 Wisconsin CDBG municipal programs. WWBIC's 2022 Audited Financial Statements were completed by RitzHolman LLP and for the ninth consecutive year, WWBIC had no issues that required a management letter.

WWBIC's financial management department has three CPAs on staff with a combined 70+ years of experience managing federal grant funds.

L.3. Explain how your agency will account for CDBG funds and follow the federal financial requirements, including the requirement to track CDBG funds separately from all other funding sources. (2 points)

As noted above, Abila allows WWBIC to create separate departments within the general ledger to assign revenues to their appropriate use. WWBIC receives significant budgetary support from various federal, state, and municipal agencies in its delivery of services. In accordance with the related regulations, WWBIC maintains a Cost Allocation Plan to ensure that costs are allowable, allocable, and necessary. The Cost Allocation Plan is reviewed annually to ensure that WWBIC remains in compliance with regulations.

WWBIC's Vice President of Business Services & Finance, Jon Gaines, prepares quarterly financial statements and reports detailing liquidity and operating reserves, and presents quarterly at meetings of the Audit & Finance Committee and the Board of Directors. WWBIC maintains a Board Portal on its website to make reports accessible to Board and Committee members. Mr. Gaines reviews all reimbursement requests prepared by the Accounting Manager and checked by the WWBIC Compliance team for compliance with the contracts and covenants of each funding source.

L.4. How will you track beneficiaries' data (income, race, ethnicity)? This must be tracked by the number of individuals served (cannot be reported by households). (2 points)

WWBIC collects Client, Business, and Employee demographic forms from every individual we serve (clients self-report) and capture data points in our Outcome Tracker database. We capture number in household and household income and determine low-income status according to HUD definitions in each geographic area we serve. WWBIC has been an industry pioneer in our compliance reporting for job creation and retention. Every client completes an extensive demographic form which captures race, ethnicity, household income, homelessness, disability, past employment, referral sources, and public assistance benefits. WWBIC tracks the DUNS number, date of business creation, and jobs created and retained for each business.

L.5. How will you verify and document U.S. legal status of your beneficiaries? (2 points)

Clients self-report their address on WWBIC's Client Information Form. If they have an existing business, WWBIC collects the DUNS or ITIN. These methods of data collection have been found acceptable by 12 other Wisconsin CDBG municipalities and the U.S. Small Business Administration, the U.S. Department of Agriculture, U.S. Housing and Urban Development, the U.S. Department of Agriculture, and the U.S. Department of Treasury.

L.6. How will you verify and document that beneficiaries actually reside within city limits vs townships? (2 points)

Clients self-report their address data on Client Information Forms. WWBIC will verify that the address provided is within City of Beloit limits. WWBIC will apply our established and audited monitoring and documentation protocols for this project.

L.7. Did agency staff attend at least one of the 2024 CDBG application information sessions? (2 points)

Yes