



**PUBLIC NOTICE & AGENDA**  
**BELOIT COMMUNITY DEVELOPMENT AUTHORITY**  
**City Hall Forum - 100 State Street, Beloit, WI 53511**  
**4:30 PM**  
**Wednesday, March 27, 2024**

1. CALL TO ORDER AND ROLL CALL
2. MINUTES
  - 2.a. Consideration of the minutes of the February 28, 2024 Community Development Authority meeting  
[Attachment](#)
3. PUBLIC COMMENT
4. BELOIT HOUSING AUTHORITY
  - 4.a. Presentation of the February Activity Report (Cole)  
[Attachment](#)
  - 4.b. Presentation of the December 2023 Financial Report (Cole)  
[Attachment](#)
  - 4.c. Consideration of Resolution 2024-02 Approving Beloit Housing Authority's Public Housing Write Offs (Cole)  
[Attachment](#)
5. COMMUNITY AND HOUSING SERVICES
  - 5.a. Public Hearing and Presentation of the 2023 Consolidated Annual Performance Evaluation Report (CAPER) (McBride)  
[Attachment](#)
6. SUCH OTHER MATTERS AS AUTHORIZED BY LAW  
*No business to discuss.*
7. ADJOURNMENT

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

**MINUTES**  
**COMMUNITY DEVELOPMENT AUTHORITY**  
**City Hall Forum - 100 State Street, Beloit, WI 53511**  
**4:30 PM**  
**Wednesday, February 28, 2024**

The regular meeting of the City of Beloit Community Development Authority was held on Wednesday, February 28, 2024 in the Forum of Beloit City Hall, 100 State Street.

**1. CALL TO ORDER AND ROLL CALL**

Meeting was called to order by Vice Chairperson Jasmine Hartke at 4:31 p.m. Councilor Forbeck, Commissioner Rodriguez and Commissioner Bullock were present. Councilor Leavy was present by phone, arriving in person at 4:46 p.m., Chairperson Gorman was absent.

**2. ELECTION OFFICERS**

**2.a. Election of Chairperson**

Vice-Chairperson Hartke opened the nominations for Chairperson. Commissioner Bullock nominated herself for Chairperson. No other nominations were made. Vote approved by acclamation.

**2.b. Election of Vice-Chairperson**

Chairperson Bullock opened the nominations for Vice-Chairperson. Commissioner Hartke nominated herself for Vice-Chairperson. No other nominations were made. Vote approved by acclamation.

**3. MINUTES**

**3.a. Consideration of the minutes of the December 20, 2023 Community Development Authority meeting**

Motion was made by Councilor Forbeck to approve the minutes and seconded by Vice-Chairperson Hartke. Motion was approved, voice vote (5-0).

**4. PUBLIC COMMENT**

There were no public comments.

**5. BELOIT HOUSING AUTHORITY**

**5.a. Presentation of the December 2023 Activity Report**

The December Activity Report was presented by Clinton Cole, Director of the Beloit Housing Authority. Councilor Forbeck asked if there are inspections associated with the Section 8 program. Clint stated that all participants have an initial inspection prior to move-in, an annual inspection, and may request a special inspection to allow the BHA Inspector to identify specific concerns.

Councilor Leavy asked if the Section 8 landlords are responsive and make repairs within the allowable timeframes. Clint stated that the majority are very responsive. Councilor Leavy also asked if we see repeat deficiencies and noncompliance with the same landlords. Clint stated that there are a handful of landlords that are less compliant than the majority of landlords, but the BHA works with them to ensure that repairs are made in accordance with HUD guidelines. Generally, the landlords have 30 days to make any repairs, or the unit is abated and their Housing Assistance Payment would be held. Councilor Leavy asked if Clint could provide the Board a listing of noncompliant landlords. Clint stated he would check with HUD and get back to the Board.

**5.b. Presentation of the January 2024 Activity Report**

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

**5.c. Presentation of the October 2023 Financial Report**

The September Financial Report was presented by Clinton Cole, Director of the Beloit Housing Authority. Councilor Forbeck asked about the operational expenses at 240 Portland Avenue. Clint stated the operational expenses are primarily the utilities for the unit. Clint also stated that he is working with HUD to decide what may be done with the unit moving forward, hopefully affordable housing in some form.

Councilor Leavy questioned the Fee Accountant charges, and whether those duties can be performed by BHA staff. Clint stated that BHA's Fee Accountant provides oversight to BHA's finances, and they perform specialized duties such as the calculation of the Public Housing operating subsidy. Julie added that the separation of these duties is a form of internal control that is mandated by HUD and the auditors.

**5.d. Presentation of the November 2023 Financial Report**

The September Financial Report was presented by Clinton Cole, Director of the Beloit Housing Authority

**5.e. Consideration of Resolution 2024-01, Approving Beloit Housing Authority's Fiscal Year 2023 Section Eight Management Assessment Program (SEMAP) Submission**

The staff report and Resolution 2024-01 were presented by Clinton Cole, Director of the Beloit Housing Authority. Motion to approve was made by Councilor Forbeck, seconded by Councilor Leavy. Motion was approved, voice vote (5-0).

**6. COMMUNITY AND HOUSING SERVICES**

There was no business to discuss.

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

Councilor Leavy requested to have BHA staff attend a future CDA meeting to describe their job duties and answer any questions the Commissioners may have. Councilor Forbeck asked

whether BHA could share its waiting list with the new affordable housing developments coming to the city. Clint stated that the BHA is unable to share applicant information due to the protection of privacy; however, the BHA maintains a resource listing and the new developments would be added to that list.

8. **ADJOURNMENT**

Motion was made by Chairperson Bullock, seconded by Councilor Forbeck to adjourn the meeting at 4:56 p.m. Motion was approved, voice vote (5-0).

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Michelle Bullock, Chairperson

# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	4a		
<b>Topic:</b>	February Activity Report		
<b>Date:</b>	March 27, 2024		
<b>Presenter:</b>	Clinton Cole	<b>Division:</b>	Beloit Housing Authority

## Overview/Background Information

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

## Key Issues

**Public Housing:**  
At the end of this reporting period, there were no public housing vacancies. 13 annual and 20 interim certifications were completed. 17 public housing inspections were conducted.

**Housing Choice Voucher (Section 8):**  
456 vouchers were housed on February 29, 2024, and four port-in vouchers were administered. The Housing Specialists completed 34 annual and 25 interim recertifications during this reporting period. 59 Housing Quality Standards (HQS) inspections were completed. Of these inspections, 20 units failed and will be reinspected when the identified deficiencies have been corrected.

## Conformance with Strategic Plan

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

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

## Sustainability

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

## Action Required/Recommendation

No action required. Information only.

## Fiscal Note/Budget Impact

All fiscal/budget impacts are noted in the report.

## Attachments

February 2024 Activity Report

**Beloit Community Development Authority  
Activity Report to Board for February 2024**

**PUBLIC HOUSING**

Total Public Housing Units	131 Units	
Occupied on 2/29/2024	131 Units	100% Occupancy
Vacancies on 2/29/2024	0 Units	0% Vacancy
Vacancies by Type		
Elderly	0 Units	100% Occupancy
Family	0 Units	100% Occupancy

**Public Housing Inspections**

15 annual inspections and two reinspections were completed during this reporting period.

**Public Housing Activities**

Annual Recertifications	13
Interim Recertifications	20
Tenant notices to Vacate *Not due to eviction	0
New Tenants	0
Transfers	0
Lease Terminations	0
Possible Program Violations	1
Evictions	0

**Public Housing Briefings**

Number Notified	0
Number Briefed	0

**Section 8 Program**

Total Under Lease on 2/29/2024	456 Vouchers
Total Portable Vouchers Paid	2 Vouchers
Total Port Out*	2 Vouchers
Total Port In*	4 Vouchers
February HCV HAP Funds Received	\$274,997
February HCV HAP Funds Expended	\$292,973
Current Per Unit Cost (PUC)	\$642

\* 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 41 annual inspections, 10 reinspections, and eight initial inspections during this reporting period.

### **Section 8 Activities**

New Participants	1
Annual Recertifications	34
Interim Recertifications	25
Abatements	1
Unit Transfers	3
Possible Program Violations	1
End of Program	2
Port Ins	1
Port Outs	0

### **Section 8 Briefings**

Number Notified	0
Number Briefed/Vouchers Issued	0

### **APPLICATIONS ON WAITING LIST**

Public Housing East	127
Public Housing West	127
Parker Bluff	291
Section 8 Program	397

### **Family Self-Sufficiency Participants**

Section 8 – 17

Public Housing – 12

# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	4b		
<b>Topic:</b>	December 2023 Financial Report		
<b>Date:</b>	March 27, 2024		
<b>Presenter:</b>	Clinton Cole	<b>Division:</b>	Beloit Housing Authority

## Overview/Background Information

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

## Key Issues

Attached is the Beloit Housing Authority Financial Statement prepared by the BHA Accountant as of December 31, 2023.

At the end of this reporting period, the Low-Income Public Housing (LIPH) program income was \$607,199.57 and the LIPH expenses were \$505,206.55. There was a surplus of \$101,993.02 in LIPH.

At the end of this reporting period, inflows of revenue from LIPH Grants total \$446,784.53 and related grant expenses total \$446,784.53.

At the end of this reporting period, the Project Based Voucher (PBV) program income was \$0.00 and the expenses were \$1,832.44. The PBV had a deficit of \$1,832.44. 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 \$361,873.51 and the expenses were \$309,118.58. Phase 1 had a surplus of \$52,754.93. Of this surplus, \$5.28 is the Housing Authority's portion.

At the end of this reporting period, Phase 2 program income was \$407,624.88 and the expenses were \$361,936.17. Phase 2 had a surplus of \$45,688.71. Of this surplus, \$4.57 is the Housing Authority's portion.

At the end of this reporting period, the Housing Choice Voucher (HCV) program income was \$3,541,452.29 and expenses were \$3,523,886.29. The HCV program had a surplus of \$17,566.00.

Debts owed BHA collected through December 2023: Total \$8,751.07  
TRIP Program: \$8,178.07 Repayments: \$573.00

## Conformance with Strategic Plan

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

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

## Sustainability

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

N/A



**Action Required/Recommendation**

No action required. Information only.

**Fiscal Note/Budget Impact**

All fiscal/budget impacts are noted in the report.

**Attachments**

December 2023 Financial Report

## Consolidated 2023 Budget Report for LIPH/PBV - As of December 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	50.00	1,137.56			1,137.56	50.00		50.00
4 Income - Transfer In from Other Funds	-				-			-
5 Other Income - Tenants	-				-			-
6 HAP Fraud Recovery & FSS Forfeitures	-	370.00			370.00			-
7 Other Income - Bad Debt Collections	3,000.00	121.80			121.80	3,000.00		3,000.00
8 Other Income - Laundry/Copy Fees/Misc	28,000.00	365.05			365.05	28,000.00		28,000.00
9 Other Income - CFP/Operations Money	300,000.00	99,187.00	374,092.11		473,279.11	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	21,567.76	24,675.16			24,675.16	21,567.76		21,567.76
13 ROSS/FSS Grant	101,930.86		72,692.42		72,692.42	101,930.86		101,930.86
14 HAP Subsidy	-				-			-
15 Operating Subsidy	444,430.00	481,343.00			481,343.00	444,430.00		444,430.00
<b>Total Income</b>	<b>898,978.62</b>	<b>607,199.57</b>	<b>446,784.53</b>	-	<b>1,053,984.10</b>	898,978.62		898,978.62
Expenses	Approved YTD	LIPH	LIPH Grant	PBV	Total	LIPH/PBV	Total	
<b>Administrative Expenses</b>								
16 Admin Salaries	77,182.34	77,876.46			77,876.46	77,182.34		77,182.34
17 ROSS/FSS Coordinator Admin Salaries	84,475.20		52,989.96		52,989.96	84,475.20		84,475.20
18 Admin Employee Benefits	38,993.44	33,180.21			33,180.21	38,993.44		38,993.44
19 ROSS/FSS Coordinator Admin Benefits	17,305.66		19,702.46		19,702.46	17,305.66		17,305.66
20 Advertising & Marketing	50.00	46.12			46.12	50.00		50.00
21 Legal	100.00				-	100.00		100.00
22 Staff Training	2,500.00		4,630.54		4,630.54	2,500.00		2,500.00
23 Travel	200.00	413.69			413.69	200.00		200.00
24 Accounting Consultants	7,250.00	4,093.00		1,142.00	5,235.00	7,250.00		7,250.00
25 Audit Fee	11,440.00	12,155.00			12,155.00	11,440.00		11,440.00
26 Telephone	1,400.00	1,832.33			1,832.33	1,400.00		1,400.00
27 Postage	3,750.00	4,528.81			4,528.81	3,750.00		3,750.00
28 Office Supplies	400.00	649.37			649.37	400.00		400.00
29 Memberships & Publications	2,048.00	682.22			682.22	2,048.00		2,048.00
30 Bank Fees	-	140.00			140.00			-
31 Computer Maintenance	-				-			-
32 Copier Expenses	2,500.00	2,882.37			2,882.37	2,500.00		2,500.00
33 Office Equipment Maintenance	-				-			-
34 Postage Machine	-				-			-
35 Software Maintenance	4,000.00	4,226.22			4,226.22	4,000.00		4,000.00
36 Outgoing Portable Admin Fees	-				-			-
37 Sundry Administration/Compliance Fees	700.00	2,507.67			2,507.67	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)	-				-			-

	<b>Maintenance Expenses</b>	-							
42	Maintenance Salaries	3,000.00				-	3,000.00		3,000.00
43	Casual Labor - Maintenance	-				-			-
44	Maintenance Benefits	1,000.00				-	1,000.00		1,000.00
45	Maintenance Materials & Supplies	500.00	23.80			23.80	500.00		500.00
46	Plumbing Supplies	-	26.47			26.47			-
47	Locks, Locksets & Keys	-				-			-
48	Electrical Supplies	-				-			-
49	Painting Supplies	-				-			-
50	Cleaning Supplies	200.00	530.76			530.76	200.00		200.00
51	Equipment Repair Parts	-				-			-
52	Maintenance Contracted Services	1,500.00	221.50			221.50	1,500.00		1,500.00
53	Refuse Removal Services	100.00			192.48	192.48	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	100.00	82.00			82.00	100.00		100.00
59	Elevator Repair & Maintenance	1,500.00	1,674.34			1,674.34	1,500.00		1,500.00
60	Pest Control Services	-				-			-
61	Cable TV	-				-			-
62	Answering Service	3,200.00	5,372.15			5,372.15	3,200.00		3,200.00
63	Misc Contracts	-				-			-
64	Clean/Paint Units	-				-			-
	<b>Utilities Expenses</b>	-							
65	Water/Sewer	1,600.00	1,939.47		99.00	2,038.47	1,600.00		1,600.00
66	Electricity	5,500.00	7,642.03		190.36	7,832.39	5,500.00		5,500.00
67	Natural Gas	2,500.00	2,356.91			2,356.91	2,500.00		2,500.00
	<b>Other Operating Expenses</b>	-							
68	Protective Services Contract	2,000.00	2,124.14			2,124.14	2,000.00		2,000.00
69	Insurance	17,150.82	16,714.95		208.60	16,923.55	17,150.82		17,150.82
70	PILOT	-				-			-
71	Compensated Absences	-	12,884.58			12,884.58			-
72	Collection Losses	-				-			-
73	Replacement Reserves & Debt Pmt-Princ	-				-			-
74	Other General Expense/Asset Mgmt Fees	273,426.60	308,399.98			308,399.98	273,426.60		273,426.60
75	Casualty Losses - Non Capitalized	-				-			-
76	Capital/Operations Expenditures	193,500.00		369,461.57		369,461.57	193,500.00		193,500.00
77	Transfer In / Out	-				-			-
	<b>Total Expense</b>	<b>761,072.06</b>	<b>505,206.55</b>	<b>446,784.53</b>	<b>1,832.44</b>	<b>953,823.52</b>	761,072.06	-	761,072.06

**Net Income/(Loss):**

101,993.02	-	(1,832.44)	100,160.58
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**Cash Flow Statement**  
**Beloit Housing Authority**  
**LIPH/PBV**  
**As of 12/31/2023**

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>					
Dwelling Rent/Utilities	-		-		-
Interest on Investments	1,137.56		50.00	0.00%	1,087.56
Other Income	856.85	374,092.11	331,000.00	113.28%	43,948.96
HUD Admin Fees			-		-
HUD Grants/Subsidies	605,205.16	72,692.42	567,928.62	119.36%	109,968.96
<b>Total Income</b>	<b>607,199.57</b>	<b>446,784.53</b>	<b>898,978.62</b>		<b>155,005.48</b>
<b>Expenses</b>					
<b>Administrative</b>					
Salaries/Benefits	111,056.67	72,692.42	217,956.64	84.31%	34,207.55
Office Expenses	28,190.21	4,630.54	33,838.00	96.99%	1,017.25
Office Contracted Services	7,108.59		6,500.00	109.36%	(608.59)
Oper Sub Transfer/Mgmt Fee Pd			-		-
Housing Assistance Pmts			-		-
HAP Payments Port In					
<b>Maintenance</b>					
Salaries/Benefits	-		-		-
Materials & Supplies	581.03	-	700.00	83.00%	118.97
Maintenance Contracts	7,542.47		6,400.00	117.85%	(1,142.47)
Utilities	12,227.77		9,600.00	127.37%	(2,627.77)
<b>Other Operating</b>					
Protective Services	2,124.14		2,000.00	106.21%	(124.14)
Insurance	16,923.55		17,150.82	98.67%	227.27
PILOT	-		-	0.00%	-
Other Operating Expenses	321,284.56	369,461.57	466,926.60	147.93%	(223,819.53)
<b>Total Expenses</b>	<b>507,038.99</b>	<b>446,784.53</b>	<b>761,072.06</b>		<b>(192,751.46)</b>
Net Admin Income (Loss)	100,160.58	-			
Net HAP Income (Loss)					
<b>Total YTD Income (Loss)</b>	<b>100,160.58</b>	<b>-</b>			

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

		YTD Actual			Annual Board Approved Budget	
Income	Approved YTD	Phase 1	Phase 1 Total	Phase 1		Total
1 Dwelling Rental	118,000.00	159,333.21	159,333.21	118,000.00		118,000.00
2 Excess Utilities	-		-			-
3 Interest on Unrestricted Fund Investments	200.00	3,696.88	3,696.88	200.00		200.00
4 Income - Transfer In from Other Funds	27,801.71	27,801.71	27,801.71	27,801.71		27,801.71
5 Other Income - Tenants	23,151.88	17,496.19	17,496.19	23,151.88		23,151.88
6 HAP Fraud Recovery & FSS Forfeitures	-		-			-
7 Other Income - Bad Debt Collections	5,000.00	3,718.30	3,718.30	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	133,926.60	149,785.37	149,785.37	133,926.60		133,926.60
13 ROSS/CFP Grant	-		-			-
14 HAP Subsidy	-		-			-
15 Operating Subsidy	-		-			-
<b>Total Income</b>	<b>308,080.19</b>	<b>361,873.51</b>	<b>361,873.51</b>	308,080.19		308,080.19

		Approved YTD	Phase 1	Phase 1 Total	Phase 1		Total
<b>Expenses</b>							
<b>Administrative Expenses</b>							
16 Admin Payroll Expenses	79,524.27	83,405.39	83,405.39	79,524.27		79,524.27	
17 FSS Coordinator Admin Salaries	-		-			-	
18 FSS Coordinator Admin Benefits	-		-			-	
19 Advertising & Marketing	50.00	47.30	47.30	50.00		50.00	
20 Legal	2,200.00	507.50	507.50	2,200.00		2,200.00	
21 Staff Training	-		-			-	
22 Travel	-		-			-	
23 Accounting Consultants	6,300.00	6,444.00	6,444.00	6,300.00		6,300.00	
24 Audit Fee	12,000.00	13,630.00	13,630.00	12,000.00		12,000.00	
25 Telephone	-		-			-	
26 Postage	-		-			-	
27 Office Supplies	260.00	476.12	476.12	260.00		260.00	
28 Memberships & Publications	-		-			-	
29 Bank Fees	82.80	35.10	35.10	82.80		82.80	
30 Computer Maintenance	-		-			-	
31 Copier Expenses	-		-			-	
32 Office Equipment Maintenance	-		-			-	
33 Postage Machine	-		-			-	
34 Software Maintenance	3,317.88	4,665.44	4,665.44	3,317.88		3,317.88	
35 Outgoing Portable Admin Fees	-		-			-	
36 Sundry Administration/Compliance Fees/TP	5,600.00	9,909.64	9,909.64	5,600.00		5,600.00	
37 Port-In HAP Expense	-		-			-	
38 Management Fees	6,739.98	7,737.51	7,737.51	6,739.98		6,739.98	

39	Eviction & Collection Agent Fees	-	-	-	-	-
40	HAP Expense (net fraud recovery to HUD)	-	-	-	-	-
	HAP Overfunding (Underfunding)	-	-	-	-	-
	<b>Maintenance Expenses</b>	-	-	-	-	-
42	Maintenance Payroll Expenses	93,681.19	77,588.59	77,588.59	93,681.19	93,681.19
43	Casual Labor - Maintenance	-	-	-	-	-
44	Maintenance Materials & Supplies	8,000.00	19,659.21	19,659.21	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	12,000.00	39,223.61	39,223.61	12,000.00	12,000.00
52	Refuse Removal Services	1,250.00	-	-	1,250.00	1,250.00
53	Plumbing Repair Services	-	-	-	-	-
54	Heating/AC Repair Services	1,000.00	1,703.00	1,703.00	1,000.00	1,000.00
55	Electric Repair Service	-	-	-	-	-
56	Window Repair Service	-	-	-	-	-
57	Automotive Repairs/Fuel	3,485.52	2,436.75	2,436.75	3,485.52	3,485.52
58	Elevator Repair & Maintenance	-	-	-	-	-
59	Pest Control Services	1,000.00	-	-	1,000.00	1,000.00
60	Cable TV	-	-	-	-	-
61	Answering Service	-	-	-	-	-
62	Misc Contracts	-	-	-	-	-
63	Clean/Paint Units	-	-	-	-	-
	<b>Utilities Expenses</b>	-	-	-	-	-
64	Water/Sewer	5,500.00	780.84	780.84	5,500.00	5,500.00
65	Electricity	1,400.00	941.40	941.40	1,400.00	1,400.00
66	Natural Gas	1,000.00	961.99	961.99	1,000.00	1,000.00
	<b>Other Operating Expenses</b>	-	-	-	-	-
67	Protective Services Contract	10,000.00	5,000.00	5,000.00	10,000.00	10,000.00
68	Insurance	14,891.47	15,002.60	15,002.60	14,891.47	14,891.47
69	PILOT	11,500.00	15,712.59	15,712.59	11,500.00	11,500.00
70	Compensated Absences	-	-	-	-	-
71	Collection Losses	-	-	-	-	-
72	Replacement Reserves & Debt Pmt-Princ	-	-	-	-	-
73	Other General Expense/Asset Mgmt Fees	3,275.00	3,250.00	3,250.00	3,275.00	3,275.00
74	Casualty Losses - Non Capitalized	-	-	-	-	-
75	Capital Expenditures	-	-	-	-	-
76	Transfer In / Out	-	-	-	-	-
	<b>Total Expense</b>	<b>284,058.11</b>	<b>309,118.58</b>	<b>309,118.58</b>	284,058.11	- 284,058.11

**Net Income/(Loss):**

52,754.93      52,754.93

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

5.28

**Cash Flow Statement**  
**Beloit Housing Authority**  
**Phase 1**  
**As of 12/31/2023**

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>				
Dwelling Rent/Utilities	159,333.21	118,000.00	135.03%	41,333.21
Interest on Investments	3,696.88	200.00	1848.44%	3,496.88
Other Income	198,843.42	162,078.48	122.68%	36,764.94
HUD Admin Fees		-		-
HUD Grants/Subsidies		27,801.71		(27,801.71)
<b>Total Income</b>	<b>361,873.51</b>	<b>308,080.19</b>		<b>53,793.32</b>
		16,486.89		

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>				
Administrative				
Salaries/Benefits	83,405.39	79,524.27	104.88%	(3,881.12)
Office Expenses	35,715.10	26,492.80	134.81%	(9,222.30)
Office Contracted Services		3,317.88		3,317.88
Oper Sub Transfer/Mgmt Fee F	7,737.51	6,739.98	114.80%	(997.53)
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	77,588.59	93,681.19	82.82%	16,092.60
Materials & Supplies	19,659.21	8,000.00	245.74%	(11,659.21)
Maintenance Contracts	43,363.36	18,735.52	231.45%	(24,627.84)
Utilities	2,684.23	7,900.00	33.98%	5,215.77
Other Operating				
Protective Services	5,000.00	10,000.00	50.00%	5,000.00
Insurance	15,002.60	14,891.47	100.75%	(111.13)
PILOT	15,712.59	11,500.00	136.63%	(4,212.59)
Other Operating Expenses	3,250.00	3,275.00	99.24%	25.00
<b>Total Expenses</b>	<b>309,118.58</b>	<b>284,058.11</b>		<b>(25,060.47)</b>

Net Admin Income (Loss)	52,754.93
Net HAP Income (Loss)	-
<b>Total YTD Income (Loss)</b>	<b>52,754.93</b>
Housing Authority's Portion	5.28

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

	YTD Actual			Annual Board Approved Budget		
	Income	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
1 Dwelling Rental	141,000.00	203,321.00	203,321.00	141,000.00		141,000.00
2 Excess Utilities	-		-			-
3 Interest on Unrestricted Fund Investments	750.00	7,084.19	7,084.19	750.00		750.00
4 Income - Transfer In from Other Funds	27,407.83	27,407.83	27,407.83	27,407.83		27,407.83
5 Other Income - Tenants	1,200.00	10,869.81	10,869.81	1,200.00		1,200.00
6 HAP Fraud Recovery & FSS Forfeitures	-		-			-
7 Other Income - Bad Debt Collections	5,000.00	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	139,500.00	158,614.61	158,614.61	139,500.00		139,500.00
13 ROSS/CFP Grant	-		-			-
14 HAP Subsidy	-		-			-
15 Operating Subsidy	-		-			-
<b>Total Income</b>	<b>314,857.83</b>	<b>407,624.88</b>	<b>407,624.88</b>	314,857.83		314,857.83

	YTD Actual			Annual Board Approved Budget		
	Expenses	Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
<b>Administrative Expenses</b>						
16 Admin Payroll Expenses	65,552.53	76,016.17	76,016.17	65,552.53		65,552.53
17 FSS Coordinator Admin Salaries	-		-			-
18 FSS Coordinator Admin Benefits	-		-			-
19 Advertising & Marketing	50.00	76.28	76.28	50.00		50.00
20 Legal	1,500.00	1,217.90	1,217.90	1,500.00		1,500.00
21 Staff Training	-		-			-
22 Travel	-		-			-
23 Accounting Consultants	6,300.00	6,764.00	6,764.00	6,300.00		6,300.00
24 Audit Fee	11,000.00	13,630.00	13,630.00	11,000.00		11,000.00
25 Telephone	-		-			-
26 Postage	-		-			-
27 Office Supplies	260.00	785.48	785.48	260.00		260.00
28 Memberships & Publications	-		-			-
29 Bank Fees	50.00		-	50.00		50.00
30 Computer Maintenance	-		-			-
31 Copier Expenses	-		-			-
32 Office Equipment Maintenance	-		-			-
33 Postage Machine	-		-			-
34 Software Maintenance	3,317.87	4,656.27	4,656.27	3,317.87		3,317.87
35 Outgoing Portable Admin Fees	-		-			-
36 Sundry Administration/Compliance Fees/TP	5,625.00	5,698.85	5,698.85	5,625.00		5,625.00
37 Port-In HAP Expense	-		-			-
38 Management Fees	14,827.78	16,937.65	16,937.65	14,827.78		14,827.78



39	Eviction & Collection Agent Fees	-		-		-	
40	HAP Expense (net fraud recovery to HUD)	-		-		-	
	HAP Overfunding (Underfunding)	-		-		-	
	<b>Maintenance Expenses</b>	-		-		-	
42	Maintenance Payroll Expenses	70,829.84	89,147.38	89,147.38	70,829.84	70,829.84	
43	Casual Labor - Maintenance	-		-		-	
44	Maintenance Materials & Supplies	8,000.00	10,890.95	10,890.95	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	12,000.00	30,432.92	30,432.92	12,000.00	12,000.00	
52	Refuse Removal Services	3,000.00	3,471.00	3,471.00	3,000.00	3,000.00	
53	Plumbing Repair Services	-		-		-	
54	Heating/AC Repair Services	1,200.00	218.00	218.00	1,200.00	1,200.00	
55	Electric Repair Service	-		-		-	
56	Window Repair Service	-		-		-	
57	Automotive Repairs/Fuel	2,521.68	2,007.37	2,007.37	2,521.68	2,521.68	
58	Elevator Repair & Maintenance	2,750.00	3,791.57	3,791.57	2,750.00	2,750.00	
59	Pest Control Services	500.00		-	500.00	500.00	
60	Cable TV	1,750.00	6,194.83	6,194.83	1,750.00	1,750.00	
61	Answering Service	-		-		-	
62	Misc Contracts	-		-		-	
63	Clean/Paint Units	-		-		-	
	<b>Utilities Expenses</b>	-		-		-	
64	Water/Sewer	8,500.00	10,942.60	10,942.60	8,500.00	8,500.00	
65	Electricity	18,000.00	22,049.74	22,049.74	18,000.00	18,000.00	
66	Natural Gas	9,000.00	7,575.56	7,575.56	9,000.00	9,000.00	
	<b>Other Operating Expenses</b>	-		-		-	
67	Protective Services Contract	11,000.00	6,731.14	6,731.14	11,000.00	11,000.00	
68	Insurance	16,370.61	16,023.96	16,023.96	16,370.61	16,370.61	
69	PILOT	11,500.00	16,242.60	16,242.60	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	8,700.00	10,433.95	10,433.95	8,700.00	8,700.00	
74	Casualty Losses - Non Capitalized	-		-		-	
75	Capital Expenditures	-		-		-	
76	Transfer In / Out	-		-		-	
	<b>Total Expense</b>	<b>294,105.31</b>	<b>361,936.17</b>	<b>361,936.17</b>	294,105.31	-	294,105.31

**Net Income/(Loss):**

45,688.71      45,688.71

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

4.57

**Cash Flow Statement**  
**Beloit Housing Authority**  
**Phase 2**  
**As of 12/31/2023**

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>				
Dwelling Rent/Utilities	203,321.00	141,000.00	144.20%	62,321.00
Interest on Investments	7,084.19	750.00	944.56%	6,334.19
Other Income	197,219.69	145,700.00	135.36%	51,519.69
HUD Admin Fees		-		-
HUD Grants/Subsidies		27,407.83		(27,407.83)
<b>Total Income</b>	<b>407,624.88</b>	<b>314,857.83</b>		<b>92,767.05</b>

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>				
Administrative				
Salaries/Benefits	76,016.17	65,552.53	115.96%	(10,463.64)
Office Expenses	32,828.78	24,785.00	132.45%	(8,043.78)
Office Contracted Services		3,317.87		3,317.87
Oper Sub Transfer/Mgmt Fee F	16,937.65	14,827.78	114.23%	(2,109.87)
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	89,147.38	70,829.84	125.86%	(18,317.54)
Materials & Supplies	10,890.95	8,000.00	136.14%	(2,890.95)
Maintenance Contracts	46,115.69	23,721.68	194.40%	(22,394.01)
Utilities	40,567.90	35,500.00	114.28%	(5,067.90)
Other Operating				
Protective Services	6,731.14	11,000.00	61.19%	4,268.86
Insurance	16,023.96	16,370.61	97.88%	346.65
PILOT	16,242.60	11,500.00	141.24%	(4,742.60)
Other Operating Expenses	10,433.95	8,700.00	119.93%	(1,733.95)
<b>Total Expenses</b>	<b>361,936.17</b>	<b>294,105.31</b>		<b>(67,830.86)</b>

Net Admin Income (Loss)	45,688.71
Net HAP Income (Loss)	
<b>Total YTD Income (Loss)</b>	<b>45,688.71</b>
Housing Authority's Portion	4.57

# Consolidated 2023 Budget Report for Housing Choice Voucher - As of December 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	3,360.00		3,961.50	3,961.50	3,360.00		3,360.00
4 Income - Transfer In from Other Funds	-			-			-
5 Other Income - Tenants/Landlords	-		922.50	922.50			-
6 HAP Fraud Recovery & FSS Forfeitures	750.00		4,348.50	4,348.50	750.00		750.00
7 Other Income - Bad Debt Collections	-			-			-
8 Other Income - Laundry/Copy Fees/Misc	30,880.60		29,330.00	29,330.00	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	324,024.00		343,100.79	343,100.79	324,024.00		324,024.00
12 Incoming Billable Admin Fees/Oper Sub	2,000.00			-	2,000.00		2,000.00
13 ROSS/CFP Grant	-			-			-
14 HAP Subsidy	2,915,000.00		3,159,789.00	3,159,789.00	2,915,000.00		2,915,000.00
15 Operating Subsidy	-			-			-
<b>Total Income</b>	<b>3,276,014.60</b>		<b>3,541,452.29</b>	<b>3,541,452.29</b>	-	3,276,014.60	3,276,014.60

	YTD Actual				Annual Board Approved Budget		
	Expenses	Approved YTD	HCV	HCV Total	HCV	Total	
<b>Administrative Expenses</b>							
16 Admin Salaries	200,516.49		193,249.17	193,249.17	200,516.49		200,516.49
17 FSS Coordinator Admin Salaries	-			-			-
18 Admin Employee Benefits	70,124.36		61,000.30	61,000.30	70,124.36		70,124.36
19 FSS Coordinator Admin Benefits	-			-			-
20 Advertising & Marketing	50.00			-	50.00		50.00
21 Legal	500.00		3,799.24	3,799.24	500.00		500.00
22 Staff Training	1,750.00			-	1,750.00		1,750.00
23 Travel	250.00		501.52	501.52	250.00		250.00
24 Accounting Consultants	5,764.00		6,545.00	6,545.00	5,764.00		5,764.00
25 Audit Fee	11,000.00		12,155.00	12,155.00	11,000.00		11,000.00
26 Telephone	1,110.70		1,496.75	1,496.75	1,110.70		1,110.70
27 Postage	-			-			-
28 Office Supplies	2,000.00		2,537.14	2,537.14	2,000.00		2,000.00
29 Memberships & Publications	700.00		612.22	612.22	700.00		700.00
30 Bank Fees	4,212.20		4,364.73	4,364.73	4,212.20		4,212.20
31 Computer Maintenance	-			-			-
32 Copier Expenses	1,905.80		2,882.42	2,882.42	1,905.80		1,905.80
33 Office Equipment Maintenance	-			-			-
34 Postage Machine	3,500.00		4,603.63	4,603.63	3,500.00		3,500.00
35 Software Maintenance	5,750.00		7,913.48	7,913.48	5,750.00		5,750.00
36 Outgoing Portable Admin Fees	-			-			-
37 Sundry Administration/Compliance Fees	3,500.00		11,883.74	11,883.74	3,500.00		3,500.00
38 Port-In HAP Expense	-		29,330.00	29,330.00			-

39	Management Fees	-			-		-
40	Eviction & Collection Agent Fees	-			-		-
41	HAP Expense (net fraud recovery to HUD)	2,873,328.00		3,170,385.00	3,170,385.00	2,873,328.00	2,873,328.00
	HAP Overfunding (Underfunding)	42,422.00		(6,247.50)		42,422.00	42,422.00
	<b>Maintenance Expenses</b>	-					
42	Maintenance Salaries	-			-		-
43	Casual Labor - Maintenance	-			-		-
44	Maintenance Benefits	-			-		-
45	Maintenance Materials & Supplies	-			-		-
46	Plumbing Supplies	-			-		-
47	Locks, Locksets & Keys	-			-		-
48	Electrical Supplies	-			-		-
49	Painting Supplies	-			-		-
50	Cleaning Supplies	-			-		-
51	Equipment Repair Parts	-			-		-
52	Maintenance Contracted Services	-			-		-
53	Refuse Removal Services	500.00			-	500.00	500.00
54	Plumbing Repair Services	-			-		-
55	Heating/AC Repair Services	-			-		-
56	Electric Repair Service	-			-		-
57	Window Repair Service	-			-		-
58	Automotive Repairs/Fuel	357.00		435.03	435.03	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	-			-		-
	<b>Utilities Expenses</b>	-					
65	Water/Sewer	-			-		-
66	Electricity	-			-		-
67	Natural Gas	-			-		-
	<b>Other Operating Expenses</b>	-					
68	Protective Services Contract	-			-		-
69	Insurance	2,498.10		2,211.92	2,211.92	2,498.10	2,498.10
70	PILOT	-			-		-
71	Compensated Absences	-		7,980.00	7,980.00		-
72	Collection Losses	-			-		-
73	Replacement Reserves & Debt Pmt-Princ	-			-		-
74	Other General Expense/Asset Mgmt Fees	4,400.00			-	4,400.00	4,400.00
75	Casualty Losses - Non Capitalized	-			-		-
76	Capital Expenditures	-			-		-
77	Transfer In / Out	-			-		-
	<b>Total Expense</b>	<b>3,236,138.65</b>		<b>3,523,886.29</b>	<b>3,523,886.29</b>	-	3,193,716.65
							3,236,138.65

**Net Income/(Loss):**

17,566.00

**Cash Flow Statement  
Beloit Housing Authority  
Housing Choice Voucher  
As of 12/31/2023**

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>				
Dwelling Rent/Utilities		-		-
Interest on Investments	3,961.50	3,360.00	117.90%	601.50
Other Income	30,252.50	33,630.60	89.96%	(3,378.10)
HUD Admin Fees	343,100.79	324,024.00	105.89%	19,076.79
HUD Grants/Subsidies	3,164,137.50	2,915,000.00	108.55%	249,137.50
<b>Total Income</b>	<b>3,541,452.29</b>	<b>3,276,014.60</b>		<b>265,437.69</b>

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>				
Administrative				
Salaries/Benefits	254,249.47	270,640.85	93.94%	16,391.38
Office Expenses	43,895.34	30,836.90	142.35%	(13,058.44)
Office Contracted Services	15,399.53	11,155.80	138.04%	(4,243.73)
Oper Sub Transfer/Mgmt Fee Pd		-		-
Housing Assistance Pmts	3,170,385.00	2,873,328.00	110.34%	(297,057.00)
HAP Payments Port In	29,330.00		0.00%	(29,330.00)
Maintenance				
Salaries/Benefits		-		-
Materials & Supplies	435.03	357.00	121.86%	(78.03)
Maintenance Contracts		500.00	0.00%	500.00
Utilities		-		-
Other Operating				
Protective Services		-		-
Insurance	2,211.92	2,498.10	88.54%	286.18
PILOT		-		-
Other Operating Expenses	7,980.00	4,400.00	181.36%	(3,580.00)
<b>Total Expenses</b>	<b>3,523,886.29</b>	<b>3,193,716.65</b>		<b>(330,169.64)</b>

**Net Income/(Loss):** 17,566.00

# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	4c		
<b>Topic:</b>	Public Housing Tenant Accounts Receivable Write-Offs		
<b>Date:</b>	March 27, 2024		
<b>Presenter:</b>	Clinton Cole	<b>Division:</b>	Beloit Housing Authority

### Overview/Background Information

HUD and BHA Auditors have recommended that the Beloit Housing Authority write off Public Housing tenant accounts receivable (TAR) quarterly for tenants no longer living in Public Housing. The purpose of this is to ensure that the agency does not carry a large TAR at the end of the fiscal year that may damage the agency’s overall HUD management rating. BHA has not written off any bad debt since April 2019, and this was recently noted by BHA’s Auditors. All amounts have been submitted to the Wisconsin State Debt Collection system. Although the amounts are being written off of BHA’s books, these debts are still collectable.

### Key Issues

1. Since write-offs were last approved, 37 Public Housing residents vacated their units, leaving balances that are still reflected in BHA’s financial records.
2. In 2023, one Public Housing resident passed away, and the remaining balance is not collectable.
3. The total amount of these outstanding debts is \$61,221.07.
4. These amounts will be removed from the BHA’s books.
5. Although the amounts are being written off of BHA’s books, these debts are still collectable.

### Conformance with Strategic Plan

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

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

### Sustainability

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

**Write N/A if not applicable:**

N/A

### Action Required/Recommendation

Staff recommends approval of the attached resolution.

### Fiscal Note/Budget Impact

This will result in the reduction of debt owed/accounts receivable.

### Attachments

Resolution 2024-02 and listing of Public Housing Write-Offs

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COMMUNITY DEVELOPMENT AUTHORITY

**RESOLUTION 2024-02**

**APPROVING THE WRITE-OFF OF BELOIT HOUSING AUTHORITY PUBLIC HOUSING AGED  
TENANT ACCOUNTS RECEIVABLES**

**WHEREAS**, the Department of Housing and Urban Development (HUD) and Beloit Housing Authority (BHA) Auditors recommend the write-off of Public Housing tenant accounts receivable (TAR) quarterly for tenants no longer living in Public Housing so that the agency does not carry a large TAR at the end of the year; and

**WHEREAS**, the BHA has not written off any Public Housing debts since 2019, which was noted by BHA’s Auditors conducting the 2023 financial audit; and

**WHEREAS**, 37 tenants vacated their Public Housing units, and amounts are still owed for rent, utilities, maintenance charges, late fees, move-out charges, and/or damages; and

**WHEREAS**, these amounts have been submitted to the Wisconsin State Debt Collection system, which intercepts debts owed from Wisconsin state tax refunds.

**NOW, THEREFORE BE IT RESOLVED**, that the Community Development Authority authorizes that \$61,221.07 be written off the Beloit Housing Authority financial records.

Adopted this 27th day of March, 2024

**Community Development Authority**

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Michelle Bullock, Chairperson

**Attest:**

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Julie Christensen, Executive Director

<b>Public Housing Write Offs</b>						
<b>LLC Phase 1</b>						
<b>Moveout Date</b>	<b>Total</b>	<b>Rent</b>	<b>Legal Fees</b>	<b>Utility</b>	<b>Maint</b>	<b>Fees</b>
8/31/2016	\$ 12.70				\$ 12.70	
9/30/2016	\$ 0.95				\$ 0.95	
7/31/2018	\$ 9.55				\$ 9.55	
12/31/2018	\$ 2,533.01				\$ 2,533.01	
12/3/2018	\$ 2,645.03			\$ 51.48	\$ 2,593.55	
9/30/2018	\$ 4,783.49	\$ 3,694.83		\$ 167.10	\$ 846.56	\$ 75.00
5/31/2019	\$ 723.50				\$ 723.50	
12/31/2019	\$ 3,592.97	\$ 1,392.75		\$ 157.83	\$ 2,352.39	\$ 50.00
1/31/2020	\$ 270.16				\$ 270.16	
3/31/2020	\$ 392.56			\$ 43.24	\$ 349.32	
3/31/2020	\$ 1,188.29				\$ 938.29	\$ 250.00
4/30/2020	\$ 1,616.39	\$ 66.12		\$ 149.48	\$ 1,400.79	
10/27/2020	\$ 2,718.22	\$ 66.00		\$ 188.88	\$ 2,463.34	
10/31/2020	\$ 775.00			\$ 61.59	\$ 713.41	
2/28/2021	\$ 107.50	\$ 95.24		\$ 12.26		
2/28/2021	\$ 3,012.38				\$ 3,012.38	
9/30/2021	\$ 5,369.50			\$ 61.34	\$ 5,308.16	
12/31/2021	\$ 519.06				\$ 519.06	
12/31/2021	\$ 429.80				\$ 429.80	
2/28/2022	\$ 1,248.82				\$ 1,248.82	
5/31/2022	\$ 96.09			\$ 43.91	\$ 52.18	
1/31/2023	\$ 1,301.12			\$ 153.06	\$ 1,148.06	
10/4/2023	\$ 6,367.37			\$ 65.98	\$ 6,301.39	
<b>Total Phase 1</b>	<b>\$ 39,713.46</b>	<b>\$ 5,314.94</b>	<b>\$ -</b>	<b>\$ 1,156.15</b>	<b>\$ 33,227.37</b>	<b>\$ 375.00</b>
<b>LLC Phase 2</b>						
<b>Moveout Date</b>	<b>Total</b>	<b>Rent</b>	<b>Legal Fees</b>	<b>Utility</b>	<b>Maint</b>	<b>Fees</b>
12/7/2019	\$ 4,742.52			\$ 7.02	\$ 4,735.50	
12/31/2019	\$ 1,169.29				\$ 1,169.29	
12/31/2019	\$ 3,078.59				\$ 3,078.59	
1/31/2020	\$ 127.12				\$ 127.12	
2/29/2020	\$ 114.61				\$ 114.61	
8/31/2021	\$ 2,823.10			\$ 63.72	\$ 2,759.38	
11/30/2021	\$ 43.04			\$ 43.04		
1/31/2022	\$ 844.82	\$ 152.00		\$ 29.00	\$ 638.82	\$ 25.00
7/6/2022	\$ 958.22				\$ 958.22	
8/31/2022	\$ 2,977.40			\$ 23.11	\$ 2,954.29	
1/31/2023	\$ 202.42				\$ 202.42	
4/30/2023	\$ 199.28			\$ 39.54	\$ 159.74	
5/19/2023 (Deceased)	\$ 1,111.41				\$ 1,111.41	
9/30/2023	\$ 3,115.79			\$ 268.57	\$ 2,847.22	
<b>Total Phase 2</b>	<b>\$ 21,507.61</b>	<b>\$ 152.00</b>	<b>\$ -</b>	<b>\$ 474.00</b>	<b>\$20,856.61</b>	<b>\$ 25.00</b>

**Total all Phases                    \$ 61,221.07    \$ 5,466.94    \$ -    \$ 1,630.15    \$ 54,081.98    \$ 400.00**



# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	5a		
<b>Topic:</b>	Public Hearing - 2023 Consolidated Annual Performance Report (CAPER)		
<b>Date:</b>	March 27, 2024		
<b>Presenter:</b>	Megan McBride	<b>Division:</b>	Community and Housing Services

## Overview/Background Information

The Department of Housing and Urban Development (HUD) requires each CDBG Formula Grantee to submit a Consolidated Annual Performance Report (CAPER) at the end of each program year. This year-end report includes the activities and accomplishments of the City’s Community Development Block Grant funding for 2023. **This is a public hearing only; no action needs to be taken.**

## Key Issues

1. The 30-day public comment period is 2-28-2024 through 3-28-2024.
2. During the 30-day public comment period, the CAPER is available for review at City Hall at the first-floor lobby front desk, at the Beloit Public Library, and on the City’s website on the Community Development webpage.
3. Any comments submitted during the 30-day public review period and public hearing will be incorporated into the CAPER for submission to HUD.
4. A public hearing on the 2023 CAPER was held by Beloit City Council on 3-18-2024.
5. **The CAPER must be submitted to HUD on 3-31-2024.**

## Conformance with Strategic Plan

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

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

## Sustainability

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

The CDBG program complies with Social Sustainability by providing funds to activities that are in the best interest of the health and well-being of our residents.

## Action Required/Recommendation

Public hearing and presentation of 2023 CAPER. For information only. No action is needed.

## Fiscal Note/Budget Impact

N/A

## Attachments

2023 Consolidated Annual Performance Report (CAPER)

# City of Beloit

## 2023 Consolidated Annual Performance Evaluation Report (CAPER)

### CR-05 - Goals and Outcomes

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

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

Throughout 2023, the City of Beloit continued to develop the activities and projects that were undertaken by Community Housing Development Organizations (CHDO) in the two designated Neighborhood Revitalization Strategy Areas. Although this portion of the approach is not funded by CDBG, the City of Beloit has fostered a successful partnership with ACTS Housing, to encourage and support more homeownership within the city. This effort, along with the continued CDBG funded efforts have resulted in a boost of homeownership, neighborhood pride, and increased property investments.

In addition to the NRSA activities, the City of Beloit also funded the following activities in 2023:

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

Health Services: HealthNet provided medical, dental and behavioral healthcare to 31 Beloit residents with no insurance. This agency allows people to obtain services that they would otherwise not be able to afford or obtain. This access, in turn, contributes to continued employment and maintaining affordable living expenses.

Homeless and Prevention Services: The Defy Domestic Abuse Beloit program provided short-term emergency housing and case management to 74 survivors of domestic violence. Family Promise of Greater Beloit provided short-term shelter, rent assistance, eviction prevention, and case management to 167 residents. Project 16:49 provided transitional living facilities and case management to 21 unaccompanied youth. ECHO was able to provide emergency eviction prevention services to 32 households. Beloit Meals on Wheels provided daily meals to 138 seniors and or disabled persons within Beloit. The Retired and Senior Volunteer Program was able to offer transportation services to 183 clients. And the Salvation Army was able to provide supportive services to 17 households.

Job Training: Stateline Literacy Council provided ESL instruction to 64 students. Community Action provided job training to 54 individualst hrough their THRIVE program. Project 16:49 assisted 21 homeless youth through their Transitional Living Program to develop life skills necessary to achieve their personal goals and achieve stable housing and self-sufficiency.

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

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

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Affordable Housing	Affordable Housing	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	2047	1502	73.38%			
Affordable Housing	Affordable Housing	CDBG: \$	Rental units rehabilitated	Household Housing Unit	25	2	8.00%	5	0	0.00%
Affordable Housing	Affordable Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	25	21	84.00%	5	5	100.00%

Comprehensive Case Management Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	0				
Comprehensive Case Management Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	422	380	90.05%	337	425	126.11%
Economic Development	Non-Housing Community Development	CDBG: \$	Jobs created/retained	Jobs	8	8	100.00%			
Economic Development	Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	8	8	100.00%	10	0	0.00%
Future Ready Skill Training	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	427	340	79.63%	654	169	25.84%

Homeless Services	Homeless	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1079	903	83.69%	188	232	123.40%
Homeless Services	Homeless	CDBG: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	9	7	77.78%			
Homeless Services	Homeless	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	305	349	114.43%	200	206	103.00%
Homeless Services	Homeless	CDBG: \$	Homelessness Prevention	Persons Assisted	605	485	80.17%	76	159	209.21%
Improve Housing Stock	Affordable Housing Homeless Housing - Improve Substandard Housing	CDBG: \$	Rental units rehabilitated	Household Housing Unit	25	2	8.00%	10	0	0.00%
Improve Housing Stock	Affordable Housing Homeless Housing - Improve Substandard Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	25	21	84.00%	5	5	100.00%

Improve Housing Stock	Affordable Housing Homeless Housing - Improve Substandard Housing	CDBG: \$	Housing Code Enforcement/Foreclosed Property Care	Household Housing Unit	16000	9595	59.97%	4000	2691	67.28%
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**Table 1 - Accomplishments – Program Year & Strategic Plan to Date**

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

The City of Beloit utilized CDBG funds (2023 funds and prior year carr-over funds) to address the following objectives and priorities in 2023:

**Improve Housing Stock**

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

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

**Job Skills**

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

- Community Action – THRIVE program
- Project 16:49 – Robin House Transitional Living Project
- Stateline Literacy Council – Adult Literacy for Economic Prosperity

- Community Action – Merrill Community Center

**Case Management Services**

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

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

**Addressing Priorities and Objectives Cont.**

Homeless Services: The following Beloit CDBG funded programs provided assistance to homeless individuals and households or prevented homelessness: Beloit Meals on Wheels - Home Delivered Meals ECHO - Emergency Eviction Prevention (City-Wide and NRSA) Family Promise of Greater Beloit - Emergency shelter and rental assistance Family Services - Defy Domestic Abuse Beloit HealthNet - Primary, Dental, and Behavioral Healthcare to Beloit Residents Project 16:49 - Robin House The Salvation Army - Supportive Services Community Action - Resources Navigator (NRSA) Family Services - Neighborhood Resilience Project Community Social Worker (NRSA) Retired & Senior Volunteer Program of Rock County - Beloit Senior Volunteers Affordable Housing: The following Beloit CDBG funded programs provided assistance that enable more affordable housing: NeighborWorks Blackhawk Region - Homebuyer Assistance City of Beloit - Housing Rehab Loan Program Community Action - Resources Navigator (NRSA) Family Services Neighborhood Resilience Project

Community Social Worker (NRSA)The City of Beloit continued to experience low interest in the Housing Rehabilitation Loan Program in 2023. Many homeowners who have expressed interest in the program are weary of taking out a loan, particularly with high costs of supplies which requires homeowners to take out larger loans in order to address basic code and safety issues. The City's program does have guidelines to allow for a portion of the assistance to be grant funding and the other portion a low-interest or deferred loan. This has been successful and 4 of the 5 owner-occupied rehab projects which took place in 2023 involved grant funding. Two of these projects were located within a NRSA neighborhood. The City will continue to evaluate its program and community needs in order to attract additional interest in the Housing Rehab Loan Program.



**CR-10 - Racial and Ethnic composition of families assisted**

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

91.520(a)

	<b>CDBG</b>
White	561
Black or African American	374
Asian	9
American Indian or American Native	2
Native Hawaiian or Other Pacific Islander	2
<b>Total</b>	<b>948</b>
Hispanic	204
Not Hispanic	837

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

**Narrative**

The table provided above does not include all racial categories reported for 2023 CDBG beneficiaries. The table below accurately reflects the racial composition of Beloit's 2023 CDBG beneficiaries.

<b>Race</b>	<b>2023 CDBG Beneficiaries</b>
White	561
Black or African American	374
Asian	9
American Indian or Native American	2
Native Hawaiian or Other Pacific Islander	61
Black/African American and White	26
<b>Total</b>	<b>1,041</b>
Hispanic	204
Not Hispanic	837

## CR-15 - Resources and Investments 91.520(a)

### Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	678,559	854,924

Table 3 - Resources Made Available

### Narrative

The City of Beloit reprogrammed unexpended CDBG-CV1 (\$28,347) and prior year CDBG funds (\$20,041.63) to support 2023 CDBG activities. Unexpended prior year funds which were carried over into 2023 were also expended, resulting in the amount expended exceeding the resources made available.

### Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Census Tract 16 - Hackett	9	10	See below Approximately \$65,500 or 9.6% for each NRSA
Census Tract 18 - Merrill	9	10	See below Approximately \$65,500 or 9.6% for each NRSA

Table 4 – Identify the geographic distribution and location of investments

### Narrative

The City of Beloit has utilized two different approaches when referring to the expenditure of CDBG funding. There are two HUD approved Neighborhood Revitalization Strategy Areas that have been identified. In expending the funds, the City of Beloit has allocated \$131,000 or 19.3% of the total 2023 CDBG Budget of \$678,559 for services in the two NRSAs. The remainder of the funds were divided between other City-wide services.

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

The City has historically offered a Housing Rehabilitation Loan Program which is available to property owners city-wide. After additional public outreach to assess needs in the NRSA neighborhoods, specific

incentives were developed for properties within the two NRSAs. The housing stock located in both the 16th and 18th census tracts is among the oldest in the City and also containing the lowest assessed and market values. The City revised its underwriting guidelines for the Houring Rehab Loan program to allow a higher loan-to-value ratio within the two NRSA neighborhoods.

In addition, although the City of Beloit has a Code Enforcement program that completes inspections city wide, CDBG funds are utilized to fund only those conducted in the City's LMI census tracts. In 2023, \$164,100 of the annual grant was allocated for inspection and code enforcement activities.

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

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

Community Policing Strategies: To promote community partnerships and trust, the Beloit Police Department (BPD) continued partnership with the local Crime Stoppers non-profit which offers monetary rewards for anonymous tips which lead to the arrest of people who have committed crimes. To promote accessibility and community policing, a bike patrol unit was established and expanded in 2023. In 2023, the BPD also hosted a city-wide National night Out event designed to promote police community partnerships and strengthen neighborhoods by bringing together residents and personnel from the BPD and Beloit Fire Departments. Police officers also partnered on several other community events, and established regular visit with local Fresh Start (YouthBuild) students to foster positive relationships with at-risk youth.

Enhanced statistical data analysis: The BPD uses local data as well as information gained through its close partnership with Crime Stoppers to inform crime deterrent and response strategies.

Improved transparency and communication regarding crimes: The Beloit Police Department posted weekly crime stats, daily arrest logs, and updated information on most wanted individuals on the department website and shared important information on social media.

## Leveraging

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

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

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

- NeighborWorks Blackhawk Region - HOME, NSP, Federal Home Loan Bank, and private funding to provide down payment assistance to households in the City's targeted neighborhoods.
- Community Action received funding from multiple state and federal sources for its programs. The US Department of Labor Youthbuild programs, YouthBuild USA, Corporation for National and Community Services, State of Wisconsin Department of Children and Families, Community Service Block Grant, Foodshare Employment and Training (FSET), and the Affordable Care Act. In addition, Community Action receives private funding to supplement the THRIVE program and Merrill Community Center. United Way and the FSET programs supported the THRIVE program. Community Action also received NRSA funding to provide supportive services and assist in an emergency.
- Beloit's Business Community has continued to support local non-profits such as the Merrill Community Center, Community Action, the Stateline Literacy Council, and Project 16:49.
- Blackhawk Region United Way is a large supporter of many of the agencies that receive CDBG.
- The local religious community provided some funding. In addition, emergency shelter space has been provided for homelessness prevention, working closely in conjunction with Family Promise of Greater Beloit.
- The City of Beloit also received HOME funds through the Rock County Consortium. HOME funds are used to complement the City's private Capital Improvement funds, CDBG, and NSP funding for neighborhood improvements and housing rehabilitation initiatives.
- The City also partnered with the non-profit organization ACTS Housing to provide vacant tax foreclosure homes (pre-COVID foreclosures). ACTS works with households to become mortgage-ready and provides rehabilitation support and loans to rehab the property for buyers who want to live in those properties. ACTS Housing is funded entirely with private funding.
- In 2023, there was a total of \$40,585,097 worth of private investment throughout the City of Beloit. In non-LMI areas the total investment was \$12,306,716, and in LMI neighborhoods the

total private investment was \$28,278,381. This data was gathered through Building Permits issued.

- In 2023, there was a total of \$1,428,063 worth of public improvements made in LMI neighborhoods. These projects included parks improvements, converting underutilized tennis courts into pickleball courts, and watermain improvements in Census Tract 17 (\$821,081) and additional parks improvements and intersection reconstruction for improved traffic safety in Census Tract 18 (\$606,982).

## CR-20 - Affordable Housing 91.520(b)

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

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	279	310
Number of Non-Homeless households to be provided affordable housing units	0	0
Number of Special-Needs households to be provided affordable housing units	55	74
<b>Total</b>	<b>334</b>	<b>384</b>

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	162	241
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	10	5
Number of households supported through Acquisition of Existing Units	0	0
<b>Total</b>	<b>172</b>	<b>246</b>

Table 6 – Number of Households Supported

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

Service providers were able to meet and exceed the majority of goals identified for 2023. Many agencies continue to experience disproportionate demand relative to their capacity for services, resulting in waitlists for many organizations and higher than anticipated participant levels in 2023.

The City did not meet its overall goals for job training and life skills programming, which was largely due to the fact that two agencies which were funded did not expend any of their CDBG funding in 2023. This is because they are smaller agencies which have no past experience administering federal funding, so the City has worked very closely with them to develop the appropriate administrative systems and will allow them to carry-over their 2023 awards into 2024. While these programs did not have any 2023 CDBG beneficiaries to report, they are both local, grassroots organizations which primarily serve African American youth in the community. Therefore, we feel it is well worth the time and staff support needed

to help these programs be successful in administering their CDBG funding in order to achieve community goals and reach underserved populations.

**Discuss how these outcomes will impact future annual action plans.**

The City will continue to conduct outreach and technical support to agencies, particularly smaller agencies which provide important services to the community but do not have experience with administering federal funds. Providing training and support for these agencies has also enabled them to seek additional funding sources with confidence that the administrative systems they have established are sound, which will further enable them to expand their capacity and meet the needs of underserved youth and residents.

**Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity.**

<b>Number of Households Served</b>	<b>CDBG Actual</b>	<b>HOME Actual</b>
Extremely Low-income	668	0
Low-income	201	0
Moderate-income	120	0
<b>Total</b>	<b>989</b>	<b>0</b>

**Table 7 – Number of Households Served**

**Narrative Information**

CDBG funds in 2023 were used to assist 668 extremely low-income individuals, 201 low-income individuals, 120 moderate-income individuals, and 52 non-LMI residents. Therefore, approximately 95% of Beloit’s 2023 CDBG funds were used to assist LMI residents.

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

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

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

The City of Beloit employed three specific strategies, building upon previously successful efforts, to address homelessness for the 2023 program year.

1. The City supported a Community Social Worker position (CSW) through Family Services. The CSW provided in-depth case management. This may have included the following services: mental health care, financial education, long term supportive services, emergency eviction prevention, and professional health care, among others.
2. Community Action's Resources Navigator (RN) position received continued support. The RN not only provided residents with information, but also provided support to them as they worked towards self-sufficiency.
3. Multiple local agencies received CDBG awards which were utilized to offer services and facilities for homeless persons in the City. In 2023, the following agencies received assistance so that homeless persons or persons at risk of homelessness could have resources: Beloit Meals on Wheels, Community Action, ECHO, Family Promise of Greater Beloit, Family Services of Southern Wisconsin and Northern Illinois, HealthNet, Project 16:49, Retired and Senior Volunteer Program of Rock County, and the Salvation Army.

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

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

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

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

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

Through CDBG, the City of Beloit was able to provide funding and support to Project 16:49's



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

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

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

In 2023, Family Promise of Greater Beloit was able to provide emergency shelter to up to nine (9) families at one time through their shelter site which opened in 2022. In addition to providing emergency overnight shelter, Family Promise of Greater Beloit continued to offer emergency eviction prevention assistance and first month/security deposit assistance for clients. They continued their "Keys to a Better Tenancy" program to teach participants how to be more desirable tenants.

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

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

As with many other communities around the country, the City of Beloit has a severe shortage of affordable housing units which makes it very difficult for service providers to identify stable housing opportunities for individuals and families they work with. This leads to it taking significantly longer for providers to help participants transition out of programs and into safe and stable housing, thus exacerbating the shortage of providers and resources resulting in wait-lists for the vast majority of programs funded through CDBG. Since it is significantly more difficult to find new housing than to maintain existing housing, the City allocated CDBG funds in 2023 to support several programs which provide emergency eviction prevention services to help individuals and families stay in their homes.

Several of these programs focused on Beloit's NRSA neighborhoods since these are areas with the highest concentrations of LMI residents and neighborhood stabilization was a central goal in the current NRSA Plan. Programs which provided emergency eviction prevention services in 2023 included:

- Community Action - Resources Navigator (NRSA)
- ECHO - Emergency Eviction Prevention (City-Wide and NRSA funding)
- Family Services - Neighborhood Resilience Project Community Social Worker (NRSA)
- The Salvation Army - Supportive Services (City-wide)

### **Helping LMI Individuals and Families Avoid Becoming Homeless cont.**

In addition, tenants who receive housing assistance through Beloit Housing Authority's Section 8 and Public Housing programs are also eligible to participate in the Family Self-Sufficiency program. At the end of the FSS program, tenants will have successfully increased their earned income, reduced their dependence on assistance from welfare programs, and increased their self-sufficiency. Clients will work with one full-time FSS Coordinator to establish five-year employment and/or educational goals. The Beloit Housing Authority provides individuals and families the following resources to avoid homelessness: 131 public housing units and 603 Housing Choice Vouchers. In addition, in 2023 the BHA added a Homeless preference to its Public Housing and Housing Choice Voucher applications.

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

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

1. Staff support for the Defy Domestic Abuse Beloit program. Survivors were able to access food, clothing, and support groups during their stay in the shelter. Staff also is available for assistance after survivors exited the shelter.
2. ECHO is able to offer up to three month's worth of rental assistance, security deposit assistance, or utility assistance.
3. Family Promise of Greater Beloit received staff support funding in addition to emergency eviction prevention and security deposit assistance. As part of their program, FPGB has also introduced an educational component, "Keys to Good Tenancy" with the goal of providing information to beneficiaries on ways to be better and more desirable tenants.
4. The City is an active member of the Homeless Intervention Task Force and attends monthly meetings.

Members of the Rock County Continuum of Care are members and share updates and organizational activity with the members.

5. The City also began attending the newly formed Beloit Area Task Force on Homelessness (BATFoH) group, which meets monthly. This group is comprised of representatives from local service providers, local governments, and the school districts. This has helped in identifying gaps in the housing assistance cycle, and creating a better system of collaboration amongst local agencies.

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

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

### **Actions taken to address the needs of public housing**

The BHA meets residents' needs by providing various programs. The following opportunities were available to public housing residents during 2024: Family Self-Sufficiency Program (FSS) - Increase earned income and reduce the dependency on welfare assistance and rental subsidies. The term of this program is usually five years but can be extended for good cause if approved by the BHA. Special Programs Administrator- Connects residents with supportive services and activities that support their goal of economic independence and housing self-sufficiency. Housing Choice Voucher Program - The BHA administered 603 Housing Choice Vouchers. Through this program rent can be subsidized for eligible participants at participating rental units. The Beloit Housing Authority advertised available programs through local newspapers and radio stations. BHA staff have attended local senior, health, and family events to spread information about these opportunities.

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

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

### **Actions taken to provide assistance to troubled PHAs**

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

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

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

During 2023, the City issued permits for 38 new single-family dwellings and no multi-family development permits. However, the City will be utilizing TIF Housing funds in 2024 to incentivize development of new affordable housing in the community, which remains a primary community concern and challenge to homeless and housing service providers.

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

The City utilized a multi-pronged approach to meeting underserved needs in 2023. The Division collaborated with local stakeholders, nonprofits, community leaders, businesses, and other interested parties to identify community needs and the strategies to be utilized.

Although sufficient funding is an obstacle to fully meeting underserved needs, the City of Beloit is strategic in allocation of resources in order to make the most with the limited resources awarded. In 2023, the City of Beloit supported the following activities and/or funded the following programs to address homelessness, transportation, affordable and sanitary housing, individual level case management, and employment training.:

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

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

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

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

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

During 2023 the City's Housing Rehab Loan Program (HRLP) staff and the Division of Water Resources worked together on developing a program to eliminate private lead service lines used to carry drinking water to residential properties in anticipation of a grant provided through the DNR's Safe Drinking Water Loan Program. The City launched the program in 2022. In 2023, a total of 15 households were served with 16 located within a NRSA neighborhood. Although this project does not address lead based paint, we believe it is an important program that will reduce additional exposure to lead within our community. The Housing Rehab Loan Program staff will administer the program and will work with households to obtain an HRLP loan if needed to complete the project or address other issues within their home. Now that the program has been established, additional outreach will take place in 2023 to increase program participation.

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

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

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

The City of Beloit is developing institutional structure that includes private industry, non-profit organizations, and public institutions to implement its housing and community development plan. As agency silos have been identified as an impediment to successfully serving the needs of Beloit residents, this structure has been improved immensely over 2023. There are four imperative efforts that the City is has implemented to develop and enhance coordination which are described below:

- **City Membership in the Homeless Intervention Task Force (HITF)** - This group consists of agencies and local government representatives from Rock and Walworth Counties. There are at least six meetings a year to share new resources, news, and updates relating to homelessness and other related services. This is also the Continuum of Care for Rock County so all City of Beloit CDBG Subrecipients must participate and coordinate with other agencies in the area.
- **City Participation in Beloit Task Force on Homelessness (BATFoH)** - This group consists of agencies, private industry representatives, government representatives that are focused on ending homelessness within the City of Beloit.
- **Rock County HOME Consortium** - The consortium enhances coordination between the City of Beloit and City of Janesville, specifically in regards to new, single family construction and rehab/resale projects.
- **City CDBG Funding of NRSA Neighborhood Resilience Project Community Social Worker and Resources Navigator** - These positions, funded through the two designated NRSAs, were established to be "the link" for residents and requested services. The goal was to have one or two dedicated staff persons in the community that Beloit residents could turn to for questions and information when help was needed. This can include, but is not limited to: mental health counseling, financial education, rental assistance, etc.

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

census tracts, community centers, schools, and employment corridors. In 2023 the city conducted a microtransit study to analyze the possible impacts and benefits of offering a mix of fixed route and flexible public transportation options.

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

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

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

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

In 2020, the Beloit Area Task Force on Homelessness (BATFoH) was created and continues to work towards ending homelessness specifically within the City of Beloit. Service agencies, City Staff, and other relevant organizations are members of this group. As Beloit's struggles differ from other cities within Rock and Walworth Counties, this permits a more specialized approach than HITF. In 2023, the group worked to developed a shared Release of Informaiton (ROI) which would enable providers to come together and provide better coordinated support to homeless families and individuals. This approach is centered on identifying and addressing individual and family needs, and is referred to as "staffing the family." They were able to serve 14 families through this model in 2023.

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

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

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

**Identify actions taken to overcome the effects of any impediments identified in the**



## **jurisdictions analysis of impediments to fair housing choice. 91.520(a)**

The City's Analysis of Impediments to Fair Housing was completed in 2019. The Equal Opportunities Commission (EOC) began strategizing goals and action steps to address impediments identified in the Analysis. Due to consistent difficulties in achieving a quorum to hold EOC meetings in 2022, in 2023 the City reduced the required quorum size by one. This change helped tremendously, and the EOC has since been able to hold all regularly scheduled meetings with a quorum of members present.

Actions taken to address impediments to fair housing in 2023 included:

- The EOC drafted a Request for Proposals (RFP) for Fair Housing public education, training, and testing services. The RFP will be released in early 2024.
- Legal Action of Wisconsin hosted community education events, as well as trainings for service providers to build broader awareness and understanding of tenant rights.
- The City funded Legal Action of Wisconsin through ARPA funding to assist households experiencing evictions and/or unsafe property conditions.

In addition to working towards action steps, the EOC also administers and enforces the City's local Fair Housing Ordinance. Fair Housing complaints are received by City Staff, referred to an Investigator, and conciliation/mediation is facilitated if necessary. The EOC will hear administrative appeals regarding determinations of probable cause and conducts full hearings when needed to determine whether housing discrimination has occurred. The EOC has the authority to impose fines and award damages.

In 2023, the City received a total of four complaints. Two of the four cases were landlord/tenant issues and the complainants decided not to move forward with filing a formal complaint. Both were referred to Legal Action of Wisconsin for free legal assistance. One of the cases involved a property with a Section 8 voucher, and was therefore referred to the State of WI. The City received notice in early 2024 that this case was dismissed by the DWD Equal Rights Division. The final case was referred to the independent investigation firm the City of Beloit contracts with, who conducted interviews with both the complainant and respondent. Ultimately, the investigation found that there was no probable cause for discrimination by the independent investigators and reviewed by the City Attorney's office for concurrence. Both the complainant and respondent were notified of the appeal period, and no appeal of the decision was received.

## **CR-40 - Monitoring 91.220 and 91.230**

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

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

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

The City also conducts on-site annual monitoring of all its subrecipients. During the monitoring visit, staff will review client and financial files to ensure long term compliance with CDBG requirements. In 2023, monitoring was conducted to review subrecipient for PY2022 and completed CDBG-CV activities.

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

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

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

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

When the CAPER is available for comment, the City of Beloit publishes a notice in the Beloit Daily News and the City of Beloit website. Copies are also made available at City Hall and Beloit Public Library. There

is a thirty (30) day public review period, two public hearings are held, and a presentation on CDBG accomplishments is presented before the Community Development Authority (CDA) Board and City Council in conjunction with the public hearings. Any public comments received during the public review period, public hearing, or presentation are incorporated into the CAPER before being submitted.

In 2024, the public review period was held from February 28 to March 28. City Council will hold a public hearing on March 18, 2024 in conjunction with a presentation of 2023 CDBG accomplishments. A second presentation of 2023 CDBG accomplishments and public hearing will be held during the regularly scheduled Community Development Authority (CDA) Board meeting on March 27, 2024. The final CAPER will be submitted to HUD on March 30, 2024. All citizen comments will be incorporated into the final CAPER document submitted to HUD.

### **CR-45 - CDBG 91.520(c)**

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

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

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

No

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

**CR-45 - CDBG 91.520(c)**

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

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

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

No

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

### CR-58 – Section 3

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

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

**Table 8 – Total Labor Hours**

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers					
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.					
Technical assistance to help Section 3 business concerns understand and bid on contracts.					
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.					
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.	241				
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

**Table 9 – Qualitative Efforts - Number of Activities by Program**

## Narrative

- The Community Action Resources Navigator and Neighborhood Resilience Project Community Social Worker worked with individuals and families to identify their unique needs and barriers to meeting those needs, and provided direct services as well as referrals to other community resources.
- All of the Request for Proposals (RFP) have Section 3 information and certification documents in them.
- All RFPs are sent to the Beloit Housing Authority. The BHA is the Public Housing Authority in the community.
- All contracts require businesses to complete the Section 3 certification document indicating whether they are a Section 3 business concern.
- All construction projects over \$200,000 had Section 3 posters posted at the job site.
- Attempted to recruit low-income residents through: local advertising media, signs prominently displayed at the project site, contacts with community organizations and public or private agencies operating within the metropolitan area (or nonmetropolitan county) in which the Section 3 covered program or project is located, or similar methods.
- Participated in a HUD program or other program which promotes the award of contracts to business concerns which meet the definition of Section 3 business concerns.

# Attachment

## 2023 Beloit PR26 Report

	Office of Community Planning and Development U.S. Department of Housing and Urban Development Integrated Disbursement and Information System PR26 - CDBG Financial Summary Report Program Year 2023 BELOIT, WI	DATE: 02-23-24 TIME: 9:22 PAGE: 1
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**PART I: SUMMARY OF CDBG RESOURCES**

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	0.00
02 ENTITLEMENT GRANT	568,559.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	145,800.53
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	714,359.53

**PART II: SUMMARY OF CDBG EXPENDITURES**

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	705,512.51
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	705,512.51
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	149,411.15
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	854,923.66
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	(140,564.13)

**PART III: LOW/MOD BENEFIT THIS REPORTING PERIOD**

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	16,791.63
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	688,720.88
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	705,512.51
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

**LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS**

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

**PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS**

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	253,792.32
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	(164,164.67)
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	89,627.65
32 ENTITLEMENT GRANT	568,559.00
33 PRIOR YEAR PROGRAM INCOME	139,042.02
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	707,601.02
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	12.67%

**PART V: PLANNING AND ADMINISTRATION (PA) CAP**

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	149,411.15
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	(6,550.00)
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	142,861.15
42 ENTITLEMENT GRANT	568,559.00
43 CURRENT YEAR PROGRAM INCOME	145,800.53
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	714,359.53
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	20.00%



**LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17**

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Target Area Type	Drawn Amount
2022	6	1114	6801498	NWR - DPA - NRSA - 2022	05R	LWHSP	Strategy area	\$13,958.37
2022	6	1114	6859537	NWR - DPA - NRSA - 2022	05R	LWHSP	Strategy area	\$2,833.25
					<b>05R</b>	<b>Matrix Code</b>		<b>\$16,791.63</b>
2023	3	1141	6754610	Z - 1130 Jackson Street - Single Family Rehab	14A	LWH	Strategy area	\$10,285.00
2023	3	1141	6827012	Z - 1130 Jackson Street - Single Family Rehab	14A	LWH	Strategy area	\$15,420.00
					<b>14A</b>	<b>Matrix Code</b>		<b>\$25,705.00</b>
<b>Total</b>								<b>\$42,496.63</b>

**LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18**

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

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2023	4	1159	6859537	BMOW - Home Delivered Meals - 2023	05A	LWC	\$1,539.00
					<b>05A</b>	<b>Matrix Code</b>	<b>\$1,539.00</b>
2023	4	1155	6859537	RSVP - Beloit Senior Volunteers - 2023	05E	LWC	\$7,411.00
					<b>05E</b>	<b>Matrix Code</b>	<b>\$7,411.00</b>
2023	4	1152	6827012	FS - DEFY - 2023	05G	LWC	\$5,454.77
2023	4	1152	6859537	FS - DEFY - 2023	05G	LWC	\$7,058.23
					<b>05G</b>	<b>Matrix Code</b>	<b>\$12,513.00</b>
2023	4	1154	6827012	SLC - Economic Prosperity - 2023	05H	LWC	\$8,501.21
2023	4	1154	6859537	SLC - Economic Prosperity - 2023	05H	LWC	\$2,086.70
					<b>05H</b>	<b>Matrix Code</b>	<b>\$10,587.91</b>
2023	4	1151	6859537	HealthNet - Medical/Dental Access - 2023	05M	LWC	\$9,962.00
					<b>05M</b>	<b>Matrix Code</b>	<b>\$9,962.00</b>
2023	6	1167	6859537	ECHO - NRSA - Eviction Prevention - 2023	05Q	LWC	\$8,000.00
					<b>05Q</b>	<b>Matrix Code</b>	<b>\$8,000.00</b>
2023	6	1122	6827012	CAI - Merrill Neighborhood Clean-up - 2022	05V	LMA	\$4,000.00
2023	6	1161	6859537	CAI - Hackett Neighborhood Clean-up - 2023	05V	LMA	\$4,000.00
2023	6	1162	6859537	CAI - Merrill Neighborhood Clean-up - 2023	05V	LMA	\$4,000.00
					<b>05V</b>	<b>Matrix Code</b>	<b>\$12,000.00</b>
2022	6	1140	6754610	FS - Neighborhood Resilience Project - 2022	05Z	LMA	\$40,000.00
2023	4	1156	6827012	Project 16-49 - Robin House - 2023	05Z	LWC	\$6,230.84
2023	4	1156	6859537	Project 16-49 - Robin House - 2023	05Z	LWC	\$3,244.77
2023	4	1163	6859537	CAI - THRIVE - 2023	05Z	LWC	\$6,282.50
2023	4	1169	6859537	PPGB - Eviction Prevention and Emergency Shelter for Homeless Families - 2023	05Z	LWC	\$15,065.00
2023	6	1158	6859537	FS - Neighborhood Resilience Project - 2023	05Z	LWC	\$47,500.00
2023	6	1164	6859537	CAI - Merrill Community Center - 2023	05Z	LMA	\$15,000.00
2023	6	1165	6859537	CAI - Resources Navigator - 2023	05Z	LMA	\$41,664.67
					<b>05Z</b>	<b>Matrix Code</b>	<b>\$174,987.78</b>
2023	3	1141	6754610	Z - 1130 Jackson Street - Single Family Rehab	14A	LWH	\$10,285.00
2023	3	1141	6827012	Z - 1130 Jackson Street - Single Family Rehab	14A	LWH	\$15,420.00
2023	3	1142	6754610	Z - 1206 Townline Ave - SF Rehab	14A	LWH	\$12,470.00
2023	3	1142	6796544	Z - 1206 Townline Ave - SF Rehab	14A	LWH	\$9,605.00
2023	3	1142	6827012	Z - 1206 Townline Ave - SF Rehab	14A	LWH	\$2,800.00
2023	3	1143	6754610	Z - 1323 Prairie Avenue - SF Rehab	14A	LWH	\$10,250.00
2023	3	1143	6796544	Z - 1323 Prairie Avenue - SF Rehab	14A	LWH	\$10,050.00
2023	3	1144	6754610	Z - 453 Central Avenue - SF Rehab	14A	LWH	\$8,000.00
2023	3	1144	6827012	Z - 453 Central Avenue - SF Rehab	14A	LWH	\$5,800.00
2023	3	1144	6859537	Z - 453 Central Avenue - SF Rehab	14A	LWH	\$3,325.00
2023	3	1171	6859537	Z - 1111 Roosevelt Ave - SF Rehab	14A	LWH	\$15,491.50
					<b>14A</b>	<b>Matrix Code</b>	<b>\$103,496.50</b>
2023	3	1150	6827012	COB - Housing Rehab Loan Administration - 2023	14H	LWH	\$91,312.28
2023	3	1150	6859537	COB - Housing Rehab Loan Administration - 2023	14H	LWH	\$21,034.66
					<b>14H</b>	<b>Matrix Code</b>	<b>\$112,346.94</b>
2022	1	1119	6796544	COB - Code Enforcement - 2022	15	LMA	\$53,880.86
2023	1	1148	6827012	COB - Code Enforcement - 2023	15	LMA	\$131,995.89
					<b>15</b>	<b>Matrix Code</b>	<b>\$185,876.75</b>
2021	6	1097	6796544	WWBC - Small Business Assistance - 2021	18C	LWCMC	\$20,000.00





Office of Community Planning and Development  
 U.S. Department of Housing and Urban Development  
 Integrated Disbursement and Information System  
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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2021	5	1136	6796544	WWBIC - Wisconsin Contigo - 2021	18C	LMI	\$10,000.00
2021	5	1137	6796544	WWBIC - AL-TT's Hair Studio - 2021	18C	LMI	\$10,000.00
2021	5	1138	6796544	WWBIC - El Lugar - 2021	18C	LMI	\$10,000.00
<b>Total</b>							<b>\$60,000.00</b>
							<b>\$688,720.88</b>

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity to prevent, prepare for, and respond to Coronavirus	Activity Name	Grant Number	Fund Type	Matrix Code	National Objective	Drawn Amount
2023	4	1159	6859537	No	BMOW - Home Delivered Meals - 2023	B23MC550013	EN	05A	LMC	\$1,539.00
									<b>05A Matrix Code</b>	<b>\$1,539.00</b>
2023	4	1155	6859537	No	RSVP - Beloit Senior Volunteers - 2023	B23MC550013	EN	05E	LMC	\$7,411.00
									<b>05E Matrix Code</b>	<b>\$7,411.00</b>
2023	4	1152	6827012	No	FS - DEFY - 2023	B23MC550013	EN	05G	LMC	\$5,454.77
2023	4	1152	6859537	No	FS - DEFY - 2023	B23MC550013	EN	05G	LMC	\$7,058.23
									<b>05G Matrix Code</b>	<b>\$12,513.00</b>
2023	4	1154	6827012	No	SLC - Economic Prosperity - 2023	B23MC550013	EN	05H	LWC	\$8,901.21
2023	4	1154	6859537	No	SLC - Economic Prosperity - 2023	B23MC550013	EN	05H	LWC	\$2,085.70
									<b>05H Matrix Code</b>	<b>\$10,987.91</b>
2023	4	1151	6859537	No	HealthNet - Medical/Dental Access - 2023	B23MC550013	EN	05M	LWC	\$9,962.00
									<b>05M Matrix Code</b>	<b>\$9,962.00</b>
2023	6	1167	6859537	No	ECHO - NRSA - Eviction Prevention - 2023	B23MC550013	EN	05Q	LWC	\$8,000.00
									<b>05Q Matrix Code</b>	<b>\$8,000.00</b>
2022	6	1114	6801498	No	NWBR - DPA - NRSA - 2022	B22MC550013	EN	05R	LMIHSP	\$13,958.37
2022	6	1114	6859537	No	NWBR - DPA - NRSA - 2022	B22MC550013	EN	05R	LMIHSP	\$2,833.26
									<b>05R Matrix Code</b>	<b>\$16,791.63</b>
2022	6	1122	6827012	No	CAI - Merrill Neighborhood Clean-up - 2022	B22MC550013	EN	05V	LMA	\$4,000.00
2023	6	1161	6859537	Yes	CAI - Hackett Neighborhood Clean-up - 2023	B23MC550013	EN	05V	LMA	\$4,000.00
2023	6	1162	6859537	No	CAI - Merrill Neighborhood Clean-up - 2023	B23MC550013	EN	05V	LMA	\$4,000.00
									<b>05V Matrix Code</b>	<b>\$12,000.00</b>
2022	6	1140	6754610	No	FS - Neighborhood Resilience Project - 2022	B22MC550013	EN	05Z	LMA	\$40,000.00
2023	4	1156	6827012	No	Project 16:49 - Robin House - 2023	B23MC550013	EN	05Z	LWC	\$6,230.84
2023	4	1156	6859537	No	Project 16:49 - Robin House - 2023	B23MC550013	EN	05Z	LWC	\$3,244.77
2023	4	1163	6859537	No	CAI - THRIVE - 2023	B23MC550013	EN	05Z	LWC	\$6,282.50
2023	4	1169	6859537	No	FPGB - Eviction Prevention and Emergency Shelter for Homeless Families - 2023	B23MC550013	EN	05Z	LWC	\$15,065.00
2023	6	1158	6859537	No	FS - Neighborhood Resilience Project - 2023	B23MC550013	EN	05Z	LWC	\$47,500.00
2023	6	1164	6859537	No	CAI - Merrill Community Center - 2023	B23MC550013	EN	05Z	LMA	\$15,000.00
2023	6	1165	6859537	No	CAI - Resources Navigator - 2023	B23MC550013	EN	05Z	LMA	\$41,664.67
									<b>05Z Matrix Code</b>	<b>\$174,987.78</b>
									<b>No</b>	<b>\$249,792.32</b>
									<b>Yes</b>	<b>\$4,000.00</b>
<b>Total</b>									<b>\$253,792.32</b>	

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2023	2	1149	6827012	COB - Program Administration - 2023	21A		\$144,453.59
					<b>21A Matrix Code</b>		<b>\$144,453.59</b>
2021	2	1050	6796544	COB - Fair Housing - 2021	21D		\$3,055.09
2021	2	1050	6827012	COB - Fair Housing - 2021	21D		\$594.07
2021	2	1050	6859537	COB - Fair Housing - 2021	21D		\$958.96
2022	2	1110	6859537	COB - Fair Housing - 2022	21D		\$349.44
					<b>21D Matrix Code</b>		<b>\$4,957.56</b>
<b>Total</b>							<b>\$149,411.15</b>