

CITY OF
PORTAGE
A Place for Opportunities to Grow

HUMAN SERVICES BOARD

September 1, 2011

CITY OF PORTAGE HUMAN SERVICES BOARD

A G E N D A

Thursday, September 1, 2011

(6:30pm)

Conference Room #1

APPROVAL OF MINUTES:

- * August 4, 2011

OLD BUSINESS:

- * 1. Human Services Fair:
 - Peggy Gagen, United Way: Overview of United Way forums
 - Board discussion, event planning/preparation

NEW BUSINESS:

- * 1. FY 2010-11 CDBG Consolidated Annual Performance Evaluation Report – Public Hearing
- * 2. FY 2011-12 Advisory Board goals – Board review
- 3. Red Ribbon Week (October 22-30, 2011) activities – Board discussion

STATEMENT OF CITIZENS:

ADJOURNMENT:

MATERIALS TRANSMITTED

Resignation of Board Member Genna Nichols – Information Only

Star (*) indicates printed material within the agenda packet.

CITY OF PORTAGE HUMAN SERVICES BOARD
Minutes of Meeting, August 4, 2011

 **DRAFT**

CALL TO ORDER: 6:30 p.m.

MEMBERS PRESENT: Pamela Gilchrist, Bill Lenehan, Angela Manahan Ilori, Elma (Pat) Maye, Marc Meulman, Nadeem Mirza, Sandra Sheppard

MEMBERS EXCUSED: Diane Durian

MEMBERS ABSENT: Genna Nichols, Kyle Huitt (Youth Advisory Committee Liaison)

STAFF PRESENT: Vicki Georgeau, Deputy Director of Neighborhood Services, Elizabeth Money, Neighborhood Program Specialist

APPROVAL OF MINUTES: August 4, 2011 minutes were approved as submitted 7-0.

OLD BUSINESS:

1. Human/Public Services Public Education – Community Forum – Board discussion: Meulman summarized the staff report included in the agenda and indicated that City Council is supportive of the proposed Human Services Fair, but requested additional event planning and details (as specified in the staff report included in the agenda) be accomplished prior to moving forward with the event. Meulman indicated the proposal, as presented to Council, was less focused on inviting the general public than staff from agencies and organizations that come into contact with persons in need, but that are not necessarily typical human service agencies. Discussion occurred as to the best method to promote the event to ensure successful attendance, including targeted mailings and promotion through the Portager and Portage Gazette. Mirza asked how the Board is defining a “successful” event. Meulman and staff indicated the event needs to provide meaningful information that includes documentation that attendees can take back to work, and that event attendance should far exceed the Board members, staff, and presenters in attendance. With regard to the actual event format or agenda, staff suggested the Board consult with the United Way and the Gryphon Place, which provides information and referral training each year in various areas of interest or service. Lenehan concurred with this suggestion, and recommended Portage human/public service grantees could also be in attendance to provide basic information regarding their services to Portage residents. In addition, Lenehan recommended that the United Way and/or the Gryphon Place be invited to the next Board meeting to provide an overview of the training the agencies may be able to provide during the Fair. Ilori recommended that Board keep the September 27th date for the Fair, but there was Board consensus that there was not enough time to effectively plan the event and keep that targeted date. Ilori inquired if the Portage Community Center was the best place to host the event, and also indicated there may be a problem with room capacity if attendance was significant. Meulman indicated that detail could be determined at a later date. Regardless of facility capacity, Sheppard recommended the Board coordinate the Fair with the assistance of the Portage Community Center, which is the primary human service agency in Portage. After further discussion, there was Board consensus that the United Way and/or Gryphon Place be invited to attend the next Board meeting. In addition, each Board member was requested by the Chair to prepare a list of potential invitees for the Fair.

NEW BUSINESS:

1. Metro Transit ADA Advisory Committee–Member report: Lenehan and Meulman reported they had both attended the most recent meeting of the ADA Advisory Committee, and that changes to the grocery shopping assistance program were discussed, and additional study would be ongoing to determine if the service can be expanded beyond groceries to larger quantities and size of purchased goods.

STATEMENT OF CITIZENS: None

ADJOURNMENT: There being no further business before the Board, the meeting was adjourned at 7:40 p.m.

Respectfully submitted,
Vicki Georgeau, Deputy Director of Neighborhood Services

DRAFT

CITY OF PORTAGE, MICHIGAN

FY 2010-11

**COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROGRAM**

**CONSOLIDATED ANNUAL PERFORMANCE
EVALUATION REPORT (CAPER)**

July 1, 2010 through June 30, 2011

Prepared By:

**Vicki Georgeau, AICP
Director of Community Development
City of Portage, Michigan
Department of Community Development
7900 S. Westnedge Avenue
Portage, MI 49002**

CITY OF PORTAGE, MICHIGAN

FY 2010-11

**COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) PROGRAM
CONSOLIDATED ANNUAL PERFORMANCE EVALUATION REPORT**

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I. INTRODUCTION

The FY 2005-2009 Consolidated Plan and subsequent Annual Action Plans for the City of Portage Community Development Block Grant (CDBG) program have been prepared and approved by the U.S. Department of Housing and Urban Development (HUD). Activities and expenditure of funds must demonstrate consistency with five-year goals articulated in the Consolidated Plan and respective Annual Action Plans. End-of-grant-year reporting on the city CDBG program is required in the form of the Consolidated Annual Performance Evaluation Report (CAPER). The CAPER consists of a narrative statement of accomplishments and financial and activity summary reports generated by the HUD Integrated Disbursement and Information System (IDIS).

II. INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM (IDIS) CAPER REPORTS

HUD requires the submission of two IDIS reports for the CAPER: 1) the CDBG Activity Summary Report and 2) the CDBG Financial Summary Report. The first tabular report (on pages 2-7) provides program activity details such as planned versus actual expenditures, geographic location, and socio-economic data regarding beneficiaries. The second tabular report (on pages 8-9) provides financial reporting details such as funding resources available, program income received, percent of funds expended for low-income beneficiaries, public services and administration. A final tabular report, Program Income Details By Fiscal Year and Program (page 10), is also provided as information to supplement the CDBG Financial Summary Report. A supplemental narrative follows these reports and consists of Sections III through V, which explains in further detail activities carried out during FY 2010-11. The following provides explanation of adjustments to the second tabular report, the CDBG Financial Summary for Program Year 2009:

1. Part I, Summary of CDBG Resources, Line 7: A negative \$56,355.63 adjustment was entered on the "Adjustment To Compute Total Available" line. This adjustment was made to accurately reflect Program Income received in IDIS during the program year. Line 5 of the CDBG Financial Summary Report indicates a Current Year Program Income of \$91,082.67, while the actual amount for the 2010-11 program year was \$34,727.04. See Table E, Program Income FY 2010-11 on page 28 of the CAPER narrative and the attached "Program Income Details By Fiscal Year and Program" IDIS report (PR09).
2. Part IV, Public Service Cap Calculations, Line 34: A \$20,326.10 adjustment was entered on the "Adjustment To Compute Total Subject to PS Cap" line. This adjustment was made to accurately reflect Program Income received in IDIS during the previously completed 2008-09 program year (\$60,014.14), which is the program income used to calculate the Public Service Cap.
3. Part V, Planning and Administrative (PA) Cap, Line 44: A negative \$56,355.63 adjustment was entered on the "Adjustment To Compute Total Subject to PA Cap" line. This adjustment was made to accurately reflect Program Income received in IDIS during the program year. Line 5 of the CDBG Financial Summary Report indicates a Current Year Program Income of \$91,082.67, while the actual amount for the 2010-11 program year was \$34,727.04. See Table E, Program Income FY 2010-11 on page 28 of the CAPER narrative and the attached "Program Income Details By Fiscal Year and Program" IDIS report (PR09).



PGM Year: 2010
Project: 0001 - OWNER OCCUPIED HOUSING REHABILITATION
IDIS Activity: 114 - Owner Occupied Housing Rehabilitation

Status: Completed
Location: Address Suppressed
Objective: Provide decent affordable housing
Outcome: Sustainability
Matrix Code: Rehab; Single-Unit Residential (14A)
National Objective: LMH

Initial Funding Date: 10/18/2010
Financing: EMERGENCY REPAIRS AND REHABILITATION TO OWNER-OCCUPIED LOW-INCOME HOUSING UNITS.

Funded Amount: 1,214,632.10
Drawn Thru Program Year: 110,421.10
Drawn in Program Year: 110,421.10

Proposed Accomplishments

Housing Units : 121

Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	10	0	0	0	10	0	0	0
Black/African American:	1	0	0	0	1	0	0	0
Asian:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native:	0	0	0	0	0	0	0	0
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	0	0
Black/African American & White:	0	0	0	0	0	0	0	0
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	0	0
Other multi-racial:	0	0	0	0	0	0	0	0
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	11	0	0	0	11	0	0	0

Female-headed Households: 7

Income Category:	Owner	Renter	Total	Person
Extremely Low	1	0	1	0
Low Mod	10	0	10	0
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	11	0	11	0
Percent Low/Mod	100.0%		100.0%	

Annual Accomplishments

Year # Benefiting

2010 11 EXPENDED \$110,421 TO ASSIST 11 LOW-MODERATE INCOME HOME OWNERS WITH THE REHABILITATION OF SINGLE-FAMILY DWELLINGS.

PGM Year: 2010
Project: 0002 - DOWN PAYMENT ASSISTANCE - OWNER-OCCUPIED HOUSING
IDIS Activity: 115 - DOWN PAYMENT ASSISTANCE
Status: Completed
Location: SCATTERED SITE ADDRESSES PORTAGE, MI 49002
Objective: Provide decent affordable housing
Outcome: Availability/accessibility
Matrix Code: Direct Homeownership Assistance (13) **National Objective:** LMH

Initial Funding Date: 10/18/2010
Financing:
 Funded Amount: 6,000.00
 Drawn Thru Program Year: 6,000.00
 Drawn In Program Year: 6,000.00
Proposed Accomplishments
 Households (General) : 2
Actual Accomplishments

Number assisted:

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

Female-headed Households: 0

Income Category:

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

Annual Accomplishments Year	# Benefiting	Accomplishment Narrative
2010	2	EXPENDED \$6,000 TO ASSIST TWO INCOME ELIGIBLE HOME BUYERS WITH THE PURCHASE OF A SINGLE-FAMILY DWELLING WITHIN A NEIGHBORHOOD STRATEGY AREA.

PGM Year: 2010
Project: 0003 - HUMAN/PUBLIC SERVICES-PORTAGE COMMUNITY CENTER
IDIS Activity: 116 - HUMAN/PUBLIC SERVICES
Status: Completed
Location: 325 E Centre Ave Portage, MI 49002-5512
Objective: Create economic opportunities
Outcome: Sustainability
Matrix Code: Public Services (General) (05) National Objective: LMC

Initial Funding Date: 10/18/2010
Financing
 Funded Amount: 43,350.00
 Drawn Thru Program Year: 43,350.00
 Drawn In Program Year: 43,350.00

Proposed Accomplishments
 People (General) : 4,000
Actual Accomplishments

Number assisted:

	Owner		Renter		Total		Person	
	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic
White:	0	0	0	0	0	0	3,330	231
Black/African American:	0	0	0	0	0	0	691	10
Asian:	0	0	0	0	0	0	20	0
American Indian/Alaskan Native:	0	0	0	0	0	0	19	7
Native Hawaiian/Other Pacific Islander:	0	0	0	0	0	0	1	0
American Indian/Alaskan Native & White:	0	0	0	0	0	0	0	0
Asian White:	0	0	0	0	0	0	2	0
Black/African American & White:	0	0	0	0	0	0	122	4
American Indian/Alaskan Native & Black/African American:	0	0	0	0	0	0	4	0
Other multi-racial:	0	0	0	0	0	0	101	58
Asian/Pacific Islander:	0	0	0	0	0	0	0	0
Hispanic:	0	0	0	0	0	0	0	0
Total:	0	0	0	0	0	0	4,290	310

Female-headed Households: 0 0 0 0 0 0

Income Category:

	Owner	Renter	Total	Person
Extremely Low	0	0	0	3,625
Low Mod	0	0	0	665
Moderate	0	0	0	0
Non Low Moderate	0	0	0	0
Total	0	0	0	4,290
Percent Low/Mod				100.0%

Annual Accomplishments
 Year # Benefiting **Accomplishment Narrative**

2010 4,290 PROVIDED \$43,350 IN CDBG GRANT FUNDING TO THE PORTAGE COMMUNITY CENTER TO PROVIDE EMERGENCY ASSISTANCE (FOOD, FINANCIAL, CLOTHING, TRANSPORTATION ASSISTANCE AND YOUTH RECREATION SCHOLARSHIPS TO LOW-MODERATE INCOME PORTAGE HOUSEHOLDS.

PGM Year:	2010
Project:	0004 - NEIGHBORHOOD IMPROVEMENT-CODE ADMINISTRATION & ENFORCEMENT
IDIS Activity:	117 - NEIGHBORHOOD IMPROVEMENT
Status:	Completed
Location:	LOW-INCOME NEIGHBORHOODS PORTAGE, MI 49002
Objective:	Create suitable living environments
Outcome:	Sustainability
Matrix Code:	Code Enforcement (15)
National Objective:	LMA
Initial Funding Date:	10/18/2010
Funding	
Funded Amount:	62,226.40
Drawn Thru Program Year:	62,226.40
Drawn In Program Year:	62,226.40
Proposed Accomplishments	
Housing Units :	350
Total Population in Service Area:	12,449
Census Tract Percent Low / Mod:	50.20
Annual Accomplishments	Accomplishment Narrative
Year	# Benefiting
2010	COMPLETED CODE ADMINISTRATION AND ENFORCEMENT ACTIVITIES WITHIN LOW-MODERATE INCOME NEIGHBORHOODS TO AID IN THE PREVENTION AND ELIMINATION OF BLIGHT. RESPONDED TO 514 COMPLAINTS/IDENTIFIED VIOLATIONS OF CITY CODE THROUGHOUT THE FISCAL YEAR IN NEIGHBORHOOD STRATEGY AREAS.

PGM Year: 2010
Project: 0005 - PLANNING/ADMINISTRATION
IDIS Activity: 118 - PROGRAM PLANNING & ADMINISTRATION

Status: Completed
Location: ,

Initial Funding Date: 10/18/2010
Financing
Funded Amount: 37,526.44
Drawn Thru Program Year: 37,526.44
Drawn In Program Year: 37,526.44

Proposed Accomplishments

Year	Annual Accomplishments	Accomplishment Narrative	# Benefiting
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Objective:
Outcome:
Matrix Code: General Program Administration (21A) National Objective:

Description:
PROGRAM PLANNING AND ADMINISTRATION ACTIVITIES, INCLUDING UPDATE TO FIVE YEAR CONSOLIDATED PLAN AND ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING STUDY, FY 2011-12 ANNUAL ACTION PLAN, 2009-10 CAPER, IDIS REPORTS, EEO REPORTS, SEMI-ANNUAL LABOR REPORTS, FAIR HOUSING ACTIVITIES AND CONTINUUM OF CARE PLANNING ACTIVITIES.

Status: Completed
 Location: 5812 Monticello Ave Portage, MI 49024-1257
 Objective: Provide decent affordable housing
 Outcome: Availability/accessibility
 Matrix Code: Rehab; Single-Unit Residential (14A) National Objective: LMH

Initial Funding Date: 07/21/2011
 Financing
 Funded Amount: 5,000.00
 Drawn Thru Program Year: 5,000.00
 Drawn In Program Year: 5,000.00

Proposed Accomplishments
 Housing Units : 1
 Actual Accomplishments

Number assisted:

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

Female-headed Households: 0
 Income Category:

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

Annual Accomplishments Year	# Benefiting	Accomplishment Narrative
2010	1	Provided grant funding to Kalamazoo Valley Habitat for Humanity to assist with the rehabilitation of a single-family foreclosed home, located in a low-moderate income CDBG neighborhood. Once the project was complete, Habitat sold house to a income-eligible household.

Total Drawn In Program Year: \$264,523.94

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
 OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT
 PR 26 - CDBG Financial Summary Report

IDIS	Grantee	PORTAGE , MI
	Program Year	2010
	PART I: SUMMARY OF CDBG RESOURCES	
01	UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	139,358.67
02	ENTITLEMENT GRANT	230,723.00
03	SURPLUS URBAN RENEWAL	0.00
04	SECTION 108 GUARANTEED LOAN FUNDS	0.00
05	CURRENT YEAR PROGRAM INCOME	91,082.67
06	RETURNS	0.00
07	ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	(56,355.63)
08	TOTAL AVAILABLE (SUM, LINES 01-07)	404,808.71
	PART II: SUMMARY OF CDBG EXPENDITURES	
09	DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	226,997.50
10	ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11	AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	226,997.50
12	DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	37,526.44
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)	264,523.94
16	UNEXPENDED BALANCE (LINE 08 - LINE 15)	140,284.77
	PART III: LOW/MOD BENEFIT THIS REPORTING PERIOD	
17	EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18	EXPENDED FOR LOW/MOD MULTI-JUNIT HOUSING	0.00
19	DISBURSED FOR OTHER LOW/MOD ACTIVITIES	226,997.50
20	ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21	TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	226,997.50
22	PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%
	LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS	
23	PROGRAM YEARS(PY) COVERED IN CERTIFICATION BENEFIT CALCULATION	PY: PY: PY:
24	CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25	CUMULATIVE EXPENDITURES BENEFITTING LOW/MOD PERSONS	0.00
26	PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%
	PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS	
27	DISBURSED IN IDIS FOR PUBLIC SERVICES	43,350.00

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
 OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT
 PR 26 - CDBG Financial Summary Report

28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	43,350.00
32 ENTITLEMENT GRANT	230,723.00
33 PRIOR YEAR PROGRAM INCOME	39,688.04
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	20,326.10
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	290,737.14
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	14.91%
PART V: PLANNING AND ADMINISTRATION (PA) CAP	
37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	37,526.44
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	37,526.44
42 ENTITLEMENT GRANT	230,723.00
43 CURRENT YEAR PROGRAM INCOME	91,082.67
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	(56,355.63)
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	265,450.04
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	14.14%

III. FEDERAL RESOURCES

The City of Portage had the following resources available for affordable and supportive housing activities during the reporting period (July 1, 2010 - June 30, 2011).

RESOURCES AVAILABLE FY 2010-11

<u>CDBG PROGRAM FUNDING SOURCE</u>	<u>AMOUNT</u>
Unexpended CDBG Funds at End of Previous Reporting Period (FY 2009-10)	\$139,359
FY 2010-11 Federal CDBG Entitlement	\$230,723
CDBG Program Income Funds Received During FY 2010-11	\$ 34,727
<u>Total Revenue</u>	<u>\$404,809</u>
<u>Total FY 2010-11 Program Expenditures</u>	<u>\$264,524</u>
Total Unexpended Fund Balance at End of Program Year	\$140,285

The table above indicates Portage had \$404,809 of CDBG Program resources available during the reporting period through its entitlement grant program. As also shown on Table A, Budget and Expenditures, and Table B, Financial Summary (see page 27), the FY 2010-11 budget was \$295,723 while total expenditures were \$264,524. At the end of FY 2010-11, there was unexpended combined balance of \$140,285. Expenditure of \$50,000 of the unexpended fund balance has been budgeted for FY 2011-12, and will be directed toward assistance for Human/Public Services and Housing Program activities. In addition, up to \$28,225 (10% of the FY 2011-12 CDBG budget) may be expended on additional housing projects during FY 2011-12. Additional expenditures of the Unexpended Fund Balance requires amendment to the FY 2011-12 Annual Action Plan.

In addition to the annual CDBG entitlement grant program, \$170,000 of new funding was directly available to the City of Portage from the Michigan State Housing Development Authority (MSHDA) during the program year to assist home buyers with the purchase and rehabilitation of single-family houses. Finally, while not directly available to the city, nearly \$2 million in HUD and MSHDA resources were available to assist the community during the program year as follows: \$320,700 of MSHDA Emergency Solution Grants and \$1,494,760 of HUD Supportive Housing Grants to area emergency, transitional and permanent support housing providers.

IV. GENERAL GRANTEE NARRATIVE STATEMENT

A. Assessment of Five Year Goals

The overall objective of the City of Portage 2005-2009 Consolidated Plan is to develop and implement city CDBG program activities through one of the three statutory program goals: 1) providing decent housing, 2) creating a suitable living environment, and 3) expanding economic opportunities. The major strategies to achieve these goals are:

- Continue programs to maintain and create affordable housing opportunities;
- Minimize dangers related to lead-based paint hazards in housing;

- Support Fair Housing efforts;
- Reduce barriers to affordable housing;
- Promote neighborhood improvement;
- Address problems of persons experiencing poverty; and
- Assist in reducing the demand for homeless shelters and shelter beds by participating in countywide initiatives.

As stated in the Consolidated Plan, the city addresses housing and other community development needs as part of the funding provided by the CDBG program. On average, approximately \$300,000 is annually budgeted to specifically address the objectives listed above (although federal funding to the city has declined over the past decade, and additional decreases are anticipated in future program years). Many of the plan objectives are also addressed through ongoing city operations (for example, the Comprehensive Plan, the Capital Improvement Program, economic development initiatives and year-to-year General Fund appropriations). All activities undertaken with CDBG funds benefit extremely-low to low-income residents of Portage. The largest component, housing rehabilitation, provides the opportunity for extremely low to low-income homeowners to make affordable home improvements. As an additional benefit, improvements to homes are often in lower income target neighborhoods and therefore, CDBG-funded improvements play an important role in encouraging private investment as well. Residents in such areas who can afford improvements are more likely to make investments in their property if others are doing the same.

CDBG funding is also utilized to address blighting influences and other ordinance violations that may be detrimental to neighborhoods. The neighborhood improvement focus in lower income target neighborhoods arrests decline, and preserves property values. In some instances identification of a code violation leads to the homeowner participating in the housing rehabilitation program, which further improves the housing stock and enhances property values.

Finally, the CDBG Fund, which is augmented with the City of Portage General Fund resources, provides assistance to human/public service agencies, which support a variety of services to low and moderate income residents of Portage.

In summary, the following activities were undertaken in FY 2010-11 in the effort to meet goals of the Consolidated Plan:

- Provided housing rehabilitation loans on a city-wide basis to 11 income-eligible households (41 individuals) as part of the CDBG housing programs, identified as a “High” priority in the Consolidated Plan.
- Provided home buyer down payment assistance to two households (six individuals), identified also as a “High” priority in the Consolidated Plan.
- Funded the Portage Community Center, which provides supportive services to low/moderate income Portage residents, identified as a “medium” priority in the Consolidated Plan.

- Responded to 514 code enforcement cases in an effort to arrest blight and housing deterioration in designated low-moderate income neighborhoods.
- Provided funding to Kalamazoo Valley Habitat for Humanity to rehabilitate a foreclosed single-family dwelling to be occupied by an income eligible household.
- Approved two Payment-In-Lieu of Taxes (PILOTs) that facilitated the retention and creation of 129 units of affordable rental housing.
- Participated on the Kalamazoo County LISC Affordable Housing Partnership, which addresses countywide housing goals and targets specific housing production for low-income residents of Kalamazoo County.
- Participated on several committees assigned to prepare the Continuum-of-Care strategy and evaluation/prioritization of housing projects in conjunction with grant applications of local agencies to both the Michigan State Housing Development Authority and the Department of Housing and Urban Development. These priorities ranged from “High” to “Low” in the Consolidated Plan.
- Served on the Advisory Board and contributed to the activities of the Fair Housing Center of Southwest Michigan by providing financial assistance and in-kind administrative assistance with fair housing services carried out by the center.
- Completed administrative and planning activities related to the CDBG program, including development of the Five Year Consolidated Plan and an update to the Analysis of Impediments to Fair Housing study.
- Carried out the expenditure of remaining MSHDA HOME funds to complete one home buyer purchase-rehabilitation project, secured additional MSHDA funding, and initiated three home buyer purchase-rehabilitation projects that were near completion at the end of the program year.

B. Affirmatively Furthering Fair Housing

The City of Portage continues to take steps to affirmatively further fair housing based on the Analysis of Impediments to Fair Housing (A/I) study. The impediments identified in the 2003 A/I study were: (1) lack of understanding as to the prevalence of housing discrimination; (2) differential terms/conditions within housing transactions; (3) lack of knowledge by general public, landlords, and realtors about fair housing laws; (4) less frequent home mortgages/purchasing by racial minorities; and (5) protected classes deterred by the lack of affordable housing. Specific actions to address identified impediments were undertaken:

- The city continued to participate on the Advisory Board of the Fair Housing Center of Southwest Michigan and provided \$2,000 for the provision of fair housing services such as education, outreach, complaint investigation and referrals.
- In addition, the city sponsored the 8th annual Fair Housing Conference, which provided fair housing education for Portage housing practitioners and residents.
- The city makes referrals to Fair Housing Center of Southwest Michigan, Dispute Resolution Services and Western Michigan Legal Aid regarding fair housing and tenant/landlord issues, as necessary in response to inquiries and requests.

- In March 2011, the Executive Director of the Center made a presentation to the Human Services Board regarding fair housing activities in the community.
- In April 2011, the Portage City Council passed a resolution in recognition of Fair Housing Month.
- Finally, the city completed an update to its Analysis of Impediments to Fair Housing study during the program year.

C. Affordable Housing

Efforts to address affordable housing are undertaken as part of the CDBG Program. The affordable housing stock in Portage tends to be the houses located in mature neighborhoods. These houses are in greater need of exterior and interior repairs and major system improvements such as heating, electrical and plumbing. The CDBG Housing Rehabilitation program assists with financing these improvements. In addition, during FY 2010-11 the Down Payment Assistance Program provided no interest deferred loans for first-time homebuyers in target low-income neighborhoods. Finally, the City of Portage partnered with the Kalamazoo Valley Habitat for Humanity to assist with the substantial rehabilitation of a foreclosed single-family dwelling. The number of households and persons served directly, by income level, is provided in the following table.

Activity	Extremely Low Income	Very Low Income	Low Income	TOTALS
Housing Rehab Programs	Households (Persons)			
• Housing Rehab Loan	1 (4)	4 (12)	6 (25)	11 (41)
• Emergency Repair Grant Program	0 (0)	0 (0)	0 (0)	0 (0)
Down Payment Assistance Program Subtotal	0 (0)	0 (0)	2 (6)	2 (6)
Habitat for Humanity Rehabilitation of Foreclosed Single-family Dwelling	0 (0)	0 (0)	1 (3)	1 (3)
TOTALS	1 (4)	4 (12)	9 (34)	14 (50)

Applicants apply directly to the CDBG programs or are referred to the city by other agencies. Improvements directly assist the homeowner and help preserve the affordable housing stock in Portage. Finally, refer to the discussion of “Underserved Needs”, “Eliminate Barriers to Affordable Housing” and “Improve Public Housing” under “E. Other Actions” below for details related to other affordable housing activities.

D. Continuum-of-Care

The city participated as a member of the Kalamazoo County LISC Affordable Housing Partnership (AHP), which is the body responsible for the annual Continuum-of-Care collaborative and preparation of the Continuum of Care Planning Document for Kalamazoo County. AHP meetings are held monthly and more frequently during the prioritization of projects. A large responsibility of the AHP is to coordinate the Continuum-of-Care document for the Kalamazoo County area. The Continuum-of-

Care comprehensively addresses housing providers and resources, identifies gaps in the provision of services, and prioritizes housing needs. The document has been utilized as a narrative part of grant proposals submitted by area housing, shelter and supportive service providers.

E. Other Actions

In addition to the specific projects listed above, the Consolidated Plan outlined several other general areas related to housing that the City of Portage addressed. The following paragraphs review progress in these areas.

1. Underserved Needs

Homelessness: As indicated in the Annual Action Plan the City of Portage continued to work with communities (via the Kalamazoo County LISC Affordable Housing Partnership) within the county to determine the needs of the homeless population, and funded human service agencies that provide a variety of services to help prevent homelessness.

The City of Portage also provided human/public service funds including General Fund dollars, to a number of agencies that assist low/moderate income persons. A significant number of services help persons/families living at a poverty level and/or those persons/families that are currently homeless or are in danger of becoming homeless. Agencies funded include:

- Catholic Family Services - The ARK: Provides youth shelter, transitional and permanent housing and counseling services in an effort to protect children and reunite families when possible. General Fund: \$8,775
- Housing Resources Incorporated: Provides assistance to homeless persons and persons in danger of becoming homeless in order to secure housing. General Fund: \$18,835
- YWCA: Operates emergency shelter, transitional and permanent housing for women and their children who are victims of domestic and/or sexual abuse. General Fund: \$9,070.
- Portage Community Center: PCC provides a variety of services including emergency assistance (food, clothing, transportation, utility shut-off payments, etc.), referrals to other agency services, and hosts many programs. General Fund: \$78,217, Community Development Block Grant Fund: \$43,350.
- Gryphon Place: Provides 24-hour human/services information and referral and crisis hot line. General Fund: \$3,000.

In addition to the above, the City of Portage awarded the Kalamazoo County Public Housing Commission (PHC) a \$100,000 grant from the General Fund to support the Housing Assistance Fund, which provides tenant-based rental subsidies for extremely low-income homeless persons within the community, homelessness prevention assistance, and is utilized to leverage other public and private funds to rehabilitate and/or construct affordable rental housing benefiting

Portage residents. During the program year, the city granted the Public Housing Commission (via the Kalamazoo Family Non-Profit Housing Corporation) a PILOT to facilitate the purchase of a single-family dwelling at 1506 Schuring Road that will be rented at affordable rates to a low-income household through the Local Housing Assistance Fund program. City of Portage General Fund monies previously granted to the PHC (\$28,250) were used to assist with the purchase of the dwelling located at 1506 Schuring Road.

Special Needs: Due to funding limitations, special needs populations are not a specified priority of the Consolidated Plan. However, during the program year, the city granted a PILOT to facilitate a significant rehabilitation project of the Hearthside I & II Apartments, which resulted in the retention of 128 units of affordable housing to seniors.

2. Eliminate Barriers to Affordable Housing

One of the primary barriers to affordable housing in Portage is the cost of housing. Portage is a desirable market with a good school system. The effort to foster and maintain housing includes:

- Participating on the Kalamazoo County LISC Affordable Housing Partnership, which sets goals for affordable countywide housing production;
- Working with non-profit housing developers on affordable housing projects, such as the affordable housing projects completed in partnership with the Kalamazoo Valley Habitat for Humanity, the Public Housing Commission and the Hearthside I & II Apartments;
- Undertaking code administration and enforcement in low/moderate target areas to maintain affordable housing stock as a desirable location to live;
- Providing housing rehabilitation loans and grants to low/moderate income homeowners throughout the city to ensure maintenance of affordable housing;
- Providing home buyer assistance (no-interest deferred loans) in target areas,
- Administration of the North Portage Homebuyer Purchase-Rehabilitation Program funded by MSHDA.

3. Institutional Structure/Enhancement of Coordination

The City of Portage Department of Community Development administers the CDBG Program and the above referenced MSHDA housing program. To the extent feasible, the city also works cooperatively with the Kalamazoo County Housing Rehabilitation Program, and the Kalamazoo County Weatherization Program to coordinate and leverage resources. Also, the city continually seeks opportunities to partner with several other area service providers including Senior Services, Inc., Disability Network, the Portage Community Center, Kalamazoo Neighborhood Housing Services, Kalamazoo Valley Habitat for Humanity and MSHDA. The city is often able to work and coordinate services with these agencies to provide necessary assistance to homeowners with housing-related

problems. As noted above, the city has also partnered with local non-profit agency housing projects. By working with non-profits, the city is able to leverage the funding available to assist with a greater number and type of projects. For example, projects with Kalamazoo Valley Habitat for Humanity and other entities continue to be pursued for development on an annual basis.

4. Improve Public Housing

The City of Portage does not own or manage public housing. However, Kalamazoo County has a Public Housing Commission (PHC) that has been awarded grants from HUD and MSHDA to provide scattered site rental subsidies, and to construct and/or rehabilitate affordable rental dwelling units. In addition, the PHC recently established with local funds the Kalamazoo County Housing Assistance Fund that provides additional scattered site rental subsidies for extremely low-income households, with an emphasis on serving homeless persons. As noted above, the City of Portage awarded a \$100,000 grant from the General Fund for the Housing Assistance Fund, and during FY 2010-11, awarded the PHC a PILOT to facilitate the purchase and rehabilitation of a single-family dwelling in Portage that will be rented to a low-income household as affordable housing.

5. Lead Based Paint Hazards

Due to the relatively newer housing stock, lead-based paint has not been a significant problem in the City of Portage. However, efforts to educate the public and test and address lead-based paint hazards are undertaken in conjunction with the City of Portage CDBG Housing Rehabilitation Program and the Downpayment Assistance Program. Any hazards found during the inspection or rehabilitation process are addressed as part of the overall project in compliance with federal regulations.

6. Compliance with Program and Comprehensive Planning Requirements

The City of Portage certifies that the activities undertaken with federal grant dollars are consistent with the Consolidated Plan. The Consolidated Plan process involves outlining short and long-term goals for community development through a comprehensive planning process involving public input and consultation with community-wide service providers. CDBG funding is utilized exclusively to benefit low-income residents of Portage and to promote, to the extent possible, fair housing education and activities.

7. Reduction of Number of Persons Living Below the Poverty Level

In 2009, according to U.S. Census data, 6.3 percent of Portage residents were at or below the federal poverty level, up from 4.8 percent in 2000. Many of the CDBG programs, such as housing rehabilitation, down payment assistance, neighborhood improvement and human/public service funding directly and indirectly help

persons in poverty improve their quality of life. In addition, the city has previously participated in the local Poverty Reduction Initiative process to develop a county-wide affordable housing plan, in conjunction with efforts of the Kalamazoo County LISC Affordable Housing Partnership.

8. Priority Non-Housing Community Development Needs

Non-housing community development needs are identified as a relative low priority in the Consolidated Plan. The City of Portage receives a relatively small entitlement amount, which generally is not sufficient to fund capital projects. Capital projects are generally addressed in the City of Portage Capital Improvement Program, which is a program of specific capital projects for ten years into the future, with funding from taxes, special assessment revenues and other sources.

F. Leveraging Resources

The city received \$230,723 in federal CDBG entitlement funds this fiscal year, and budgeted receipt of \$40,000 in program income funds. In addition, \$25,000 in Prior Years' Funds was included in the overall budget. For all CDBG Program activities, which include: housing rehabilitation; down payment assistance; affordable housing projects; neighborhood improvement/code enforcement; human/public services; and program administration, \$274,391 in combined City of Portage General Fund monies (\$5,000), public and private monies (\$269,391) leveraged \$264,524 in CDBG Program expenditures. This leveraging increases the beneficial impact of CDBG Program activities. The City of Portage does not require matching funds for the Housing Rehabilitation Program, but developed incentives during the FY 2006-07 program year to encourage homeowner contributions to housing rehabilitation costs. In addition, the city seeks partnerships with non-profit housing developers to undertake affordable housing projects in order to leverage federal funding with other government and private funds.

G. Citizen Comments

A public notice was published in the August 13, 2011 issue of the Kalamazoo Gazette, indicating the availability of the FY 2010-11 Consolidated Annual Performance Evaluation Report (CAPER) for public review and comment. Citizens have the opportunity to review and comment on the CAPER at two locations within the city, and via the city website. Public comments will be accepted through September 1, 2011, and the City of Portage will hold a public hearing on September 1, 2011. A summary of public comments received and a Proof of Publication of the notice will be included in Appendix B and C respectively.

H. Self-Evaluation

Over the period covered by this Annual Performance Report (July 1, 2010 - June 30, 2011), the city has accomplished the majority of the goals set forth in the Annual Action Plan. To summarize, progress included:

- A total of \$110,421 was expended for housing rehabilitation to 11 households (41 individuals) as part of the CDBG housing programs, identified as a “High” priority in the Consolidated Plan.
- A total of \$6,000 was expended to provide home buyer down payment assistance to two households (6 individuals), identified also as a “High” priority in the Consolidated Plan.
- A total of \$43,350 (CDBG Fund) and \$117,897 (General Fund) was provided to agencies providing supportive services to low/moderate income persons and families, which was identified as a “High” priority in the Consolidated Plan.
- A total of \$62,226 was expended to address 514 code enforcement violations in an effort to arrest blight and housing deterioration in low-income target neighborhoods.
- A total of \$5,000 was expended in partnership with Kalamazoo Valley Habitat for Humanity to facilitate the rehabilitation of a foreclosed single-family dwelling.
- Committed in-kind professional resources via participation on the Advisory Board of the Fair Housing Center of Southwest Michigan, and provided \$2,000 in financial assistance for the provision of fair housing services, and sponsorship of the 8th annual Fair Housing conference and Landlord Forum at the Portage Community Center.
- A total of \$37,526 (CDBG Fund) was expended to undertake administrative activities related to the CDBG program, including fair housing services. Significant grant administration and planning activities included updates to the Five Year Consolidated Plan and the Analysis of Impediments to Fair Housing study.
- Committed \$100,000 in General Fund monies to the Kalamazoo County Housing Assistance Fund over the past two fiscal years, and granted a PILOT to facilitate the acquisition and rehabilitation of a single-family dwelling to be rented at affordable rates to an income eligible household. Remaining General Fund monies (\$28,250) from the City of Portage were used as required local match funds for the project.
- A PILOT was also granted to facilitate the rehabilitation and retention of 128 units of affordable rental housing for seniors at the Hearthside I & II Apartments.
- Staff resources were devoted toward participation on the Kalamazoo County LISC Affordable Housing Partnership, which addresses countywide housing goals and targets specific rental and owner-occupied housing production for low and moderate-income families. These activities range from “High” to “Low” priorities in the Consolidated Plan. Activities included assisting with the preparation of the Continuum-of-Care Exhibit 1 Planning Document and evaluating and prioritizing housing projects in conjunction with grant applications

of local agencies to both the Michigan State Housing Development Authority and the Department of Housing and Urban Development.

- In addition, the city completed one home buyer purchase-rehabilitation project with existing MSHDA grant funds, secured an additional \$170,000 in MSHDA grant funds, and initiated three additional home buyer purchase-rehabilitation projects that were near completion at the end of the program year

V. CDBG GRANTEE SPECIFIC NARRATIVE

A. Use of CDBG Funds vs. Priorities, Needs, Goals and Objectives of the Consolidated Plan: FY 2010-11 Projects Undertaken

In the overall effort to preserve and upgrade the quality of the existing housing stock in the city, the FY 2010-11 Annual Action Plan outlined activities that were planned to be undertaken to best utilize the limited personnel and financial resources available to the City of Portage. Each project outlined activities proposed in an effort to fulfill the overall goals contained in the Consolidated Plan. The performance that occurred in FY 2010-11 for each priority is described in the following paragraphs.

**PROJECT 1: OWNER-OCCUPIED HOUSING REHABILITATION PROGRAM
PRIORITY LEVEL IN CONSOLIDATED PLAN: HIGH**

Performance Measures: The objective of the Owner-Occupied Housing Rehabilitation Program is to provide decent affordable housing, while the intended outcome is to maintain sustainability of affordable housing.

a. Resource and Program Funds Used: \$110,421

- b. Activities Undertaken:** All activities within this project are directed toward improving the quality, and bringing up to HUD Housing Quality Standards (HQS) existing owner occupied housing units within the city. The program activities completed are as follows:

Activity	2010-11 Service Goal	# of Households Served	# of Persons Served	Amount Expended*
Housing Rehab Loans, includes water/sewer connection, interior and exterior improvements	15	11	41	\$110,421
Emergency Repair Grants	2	0	0	\$0
TOTALS	17	11	41	\$110,421

*Includes administration and delivery costs.

- c. Geographic Distribution:** The housing rehabilitation programs do not specifically target a particular area of the city. Applicants to the program must qualify based on income. As a matter of practice, however, the greatest rehabilitation need is in the older neighborhoods that generally coincide with

the low-to-moderate income target neighborhoods (see Map 1, Low/Moderate Income Target Neighborhoods, Appendix A).

- d. **Leverage with Federal Funds of Non-Federal Funds:** (\$0) Occasionally private homeowners will contribute additional funds in conjunction with rehabilitation projects. However, during the FY 2010-11 program year, no homeowners did so.
- e. **Matching Contributions:** None required.
- f. **Actual Investment Pattern vs. Planned Investment Pattern:** Seventeen households in total were projected to be assisted by the Housing Rehabilitation Program, while 11 households were assisted with a total expenditure of \$110,421, including program delivery costs. The average project expenditure, including delivery costs was \$10,038. Expenditures were \$28,406 less than budgeted. In addition, five projects were underway but not yet completed by the end of the fiscal year. Actual versus planned investment was lower than the target goal during the fiscal year as program promotion in the third and fourth quarters of the program year were halted due to significant funding cuts anticipated for the FY 2011-12 program year. In addition, additional funding for home buyer purchase-rehabilitation projects was secured through a MSHDA HOME grant, and the city completed one project and initiated three additional projects during the program year.

PROJECT 2: DOWNPAYMENT ASSISTANCE PROGRAM
PRIORITY LEVEL IN CONSOLIDATED PLAN: HIGH

Performance Measures: The objective of the Downpayment Assistance Program is to provide decent affordable housing, while the intended outcome is to increase availability and accessibility of affordable housing.

- a. **Resource and Program Funds Used:** \$6,000
- b. **Activities Undertaken:** Two projects were completed during the reporting period providing \$6,000 in assistance for home purchases in target neighborhoods, not include program administration costs.
- c. **Geographic Distribution:** The program is open to low-moderate income, first-time homebuyers who are currently residents of Kalamazoo County. Map 2, Downpayment Assistance Program Areas, Appendix A, shows the areas eligible for assistance through the Downpayment Assistance Program.
- d. **Leverage with Federal Funds of Non-Federal Funds:** (\$150,966) Funds are supplemented with a first mortgage for the purchase of the home from a lending institution. The two households assisted contributed a combined \$150,966 in private non-federal funds toward the home purchases in the form of first mortgages.

- e. **Matching Contributions:** The homebuyer must fulfill local lending institution financial requirements and obtain sufficient monies from this private sector source.
- f. **Actual Investment Pattern vs. Planned Investment Pattern:** The city assisted two low-income home buyers with a home purchase during FY 2010-11, which met the projected goal.

PROJECT 3: PORTAGE COMMUNITY CENTER, HUMAN/ PUBLIC SERVICES
PRIORITY LEVEL IN CONSOLIDATED PLAN: MEDIUM

Performance Measures: The objective of the Human/Public Service activity is to create economic opportunities for low income persons and household, while the intended outcome is to increase sustainability of such economic opportunities.

- a. **Resource and Program Funds Used:** \$43,350
- b. **Activities Undertaken:** City of Portage residents were assisted by the Portage Community Center (PCC) during the reporting period. Such services, which are explained in more detail on page 26, include emergency assistance (food, clothing and financial assistance), public transportation assistance, and youth recreation scholarships primarily to low income clientele.
- c. **Geographic Distribution:** N/A.
- d. **Leverage with Federal Funds of Non-Federal Funds:** \$43,350 of CDBG Funds was provided for human/public services to benefit low-income persons. In addition, PCC indicates that \$56,695 in additional private funds leveraged the CDBG funds for emergency assistance, transportation assistance and youth recreation scholarships. Finally, \$78,217 in city General Funds was provided to assist with the provision of services such as information and referral, host agency services, holiday basket program, and youth programs.
- e. **Matching Contributions:** N/A
- f. **Actual Investment Pattern vs. Planned Investment Pattern:** It was projected that the Portage Community Center could provide assistance to 4,000 Portage residents with CDBG Funds, while 4,290 residents within the community were assisted, which exceeded the projected goal.

**PROJECT 4: NEIGHBORHOOD IMPROVEMENT-CODE ENFORCEMENT
PRIORITY LEVEL IN CONSOLIDATED PLAN: MEDIUM
AND HIGH**

Performance Measures: The objective of the Neighborhood Improvement-Code Enforcement activity is to create suitable living environments, while the intended outcome is to increase sustainability of such living environments.

- a. **Resource and Program Funds Used:** \$62,226
- b. **Activities Undertaken:** Activities undertaken within this category include code administration and enforcement in low income target neighborhoods, ensuring elimination of blighted conditions and correction of other code violations that may have a negative effect on the health, safety and/or welfare of the neighborhood.

Activity	FY 2010-11 Service Goal	Actual Service	Amount Expended
Response to Code Violations in Low Income Target Areas	350	514	\$62,226

- c. **Geographic Distribution:** Response to code violations in low-income target neighborhoods is provided below. A map identifying these locations is included as Appendix A.

Code Enforcement Activity FY 2010-11

Census Tract & Block Group	Number of Violations
19.02-2	74
19.02-3	69
19.05-1	7
19.05-3	25
19.05-5	108
19.06-1	75
19.07-2	51
20.03-2	95
20.05-1	10

- d. **Leverage with Federal Funds of Non-Federal Funds:** (\$5,000) The City of Portage annually allocates approximately \$5,000 in General Fund monies for neighborhood improvement/code administration and enforcement activities to help cover the cost of office supplies, overhead and field equipment.
- e. **Matching Contributions:** NA
- f. **Actual Investment Pattern vs. Planned Investment Pattern:** Generally, 350-400 code violations in low-income target neighborhoods are investigated on an annual basis. In FY 2010-11, 514 violations were

processed in target neighborhoods, which were above the target goal and equals 38% of all cases addressed city-wide. In addition, zoning and community quality code administration activities occur within low income neighborhoods throughout the fiscal year. Addressing code enforcement and administration issues provided important assistance in the effort to maintain and improve these target neighborhoods. Neighborhood Improvement-Code Enforcement activities were completed within budget.

PROJECT 5: CDBG PROGRAM ADMINISTRATION
PRIORITY LEVEL IN CONSOLIDATED PLAN: N/A

- a. Resource and Program Funds Used: \$37,526**
- b. Activities Undertaken:** General administrative oversight of activities of the CDBG Entitlement Program, and completion of the Five Year Consolidated Plan, Analysis of Impediments to Fair Housing, 2011-12 Annual Action Plan, Environmental Review Record, Semi-Annual Labor Standards Enforcement Reports, FY 2009-10 CAPER, HUD monitoring, IDIS reporting and affordable housing, Continuum of Care and fair housing activities.
- c. Geographic Distribution: N/A.**
- d. Leverage with Federal Funds of Non-Federal Funds: None.**
- e. Matching Contributions: N/A**
- f. Actual Investment Pattern vs. Planned Investment Pattern:**
Administrative activities were completed within budget.

**PROJECT 6: KALAMAZOO VALLEY HABITAT FOR HUMANITY,
AFFORDABLE HOUSING REHABILITATION**
PRIORITY LEVEL IN CONSOLIDATED PLAN: HIGH

- a. Resource and Program Funds Used: \$5,000**
- b. Activities Undertaken:** An ongoing effort is made each fiscal year to identify non-profit agencies with which to partner and undertake housing related projects within the City of Portage. In the past, the city has worked with the Portage Community Center, Kalamazoo Neighborhood Housing Services, Kalamazoo Valley Habitat for Humanity, Housing Resources, Inc., and Living Ways/My Own Home, Inc. on housing project(s). For this fiscal year, \$5,000 was granted to Kalamazoo Valley Habitat for Humanity to assist with the rehabilitation of a foreclosed single-family dwelling to be occupied by a low-income household.
- c. Geographic Distribution:** The dwelling unit is located on Monticello Avenue, which is within a low-income target neighborhood.

- d. Leverage with Federal Funds of Non-Federal Funds: (\$61,730)**
Kalamazoo Valley Habitat for Humanity leveraged \$61,730 in additional public and private funds for the project.
- e. Matching Contributions: NA**
- f. Actual Investment Pattern vs. Planned Investment Pattern:** The goal is to increase the participation of area non-profits in the production and rehabilitation of housing in the City of Portage. The actual investment, connection of public utilities to a single-family dwelling, was the same as the planned investment.

B. Program Changes

No changes were made to the CDBG Program during the fiscal year.

C. Consolidated Plan Certifications

The City of Portage certifies that it is carrying out the planned actions outlined in the Consolidated Plan:

- 1) The city worked in concert with local non-profits to identify future projects.
- 2) The city provided Statements of Consistency for 17 applications for HUD funding through the Continuum of Care process. Such statements were provided in a fair and impartial manner;
- 3) The city did not hinder Consolidated Plan implementation by any action or willful inaction.

D. National Objectives

In FY 2010-11 the city expended 100% of applicable CDBG funds to benefit low-income residents.

E. Acquisition, Rehabilitation, Demolition of Occupied Real Property

No activities were undertaken that cause temporary or permanent displacement of persons or households.

F. Economic Development Activities

NA

G. Limited Clientele Benefit

The City of Portage sets aside not more than 15% of the CDBG budget for human/public service funding, consistent with federal regulations. A total of \$43,350 was awarded to the Portage Community Center (PCC) in FY 2010-11. PCC is the only non-profit agency located in the city that provides assistance to

low-income residents of Portage. PCC tracks the income levels of clients who participate in programs funded by the CDBG program. Some of the households/ persons assisted are defined as “limited clientele” pursuant to HUD definitions, however there are no special programs specifically targeted at limited clientele households/persons. In FY 2010-11, the programs listed in the following table were funded and administered by PCC.

**SUB-RECIPIENT ACTIVITY - LIMITED CLIENTELE BENEFIT
 PORTAGE COMMUNITY CENTER**

PCC Program	CDBG Funding Level	Persons Assisted/Units of Service	% Low/Moderate Income
Emergency Assistance	\$39,850	4,233	100%
Transportation Assistance	\$1,000	44	100%
Youth Recreation Scholarship	\$2,500	13	100%

H. Program Income

CDBG funds (except Emergency Repair grants) utilized in the Housing Programs are recaptured as Program Income in future years. Program Income received during FY 2010-11 is reported in Table E, page 29, Loans and Other Receivables are reported in Table F on page 29.

I. Lump Sum Agreement

NA

TABLE A						BUDGETED	EXPENDED
BUDGET AND EXPENDITURES							
Rehabilitation							
	Rehab Project Management, Loans, Grants					\$ 104,827	\$ 110,421
	Loans/Grants	Program Income				\$ 34,000	\$ -
		SUBTOTAL, Rehabilitation				\$ 138,827	\$ 110,421
Affordable Housing-Rehabilitation							
	Kalamazoo Valley Habitat for Humanity					\$ -	\$ 5,000
Neighborhood Improvement							
	Code Enforcement					\$ 66,496	\$ 62,226
Public Services - Portage Community Center						\$ 18,350	\$ 18,350
		Program Income				\$ 25,000	\$ 25,000
		SUBTOTAL, Public Services				\$ 43,350	\$ 43,350
Downpayment Assistance							
		Program Income				\$ 6,000	\$ 6,000
Administration							
	General					\$ 39,050	\$ 36,526
	Fair Housing Activities					\$ 2,000	\$ 1,000
		SUBTOTAL, Administration				\$ 41,050	\$ 37,526
					TOTAL	\$ 295,723	\$ 264,524

TABLE B							
FINANCIAL SUMMARY							
Unexpended funds at end of previous reporting Period							\$ 139,359
Entitlement Grant FY 2010-11							\$ 230,723
Program Income - Received During FY 2010-11							\$ 34,727
Prior Period Adjustments							\$ -
TOTAL AVAILABLE FUNDS							\$ 404,809
Total Expenditures							\$ 264,524
		Total Planning & Admin				\$ 37,526	
		Total Low/Mod Calc.				\$ 226,998	
Unexpended Balance							\$ 140,285

TABLE C

PUBLIC SERVICE PERCENTAGE CALCULATION						
Amount of Program Income Received In Program Year FY 2008-09						\$ 60,014
Entitlement Grant						\$ 230,723
					Total	\$ 290,737
Total Public Service Expenditures						\$ 43,350
					Percent Public Service	14.91%

TABLE D

PLANNING AND PROGRAM ADMINISTRATION CAP CALCULATION						
Entitlement Grant						\$ 230,723
Program Income Received During FY 2010-11 Program Year						\$ 34,727
					Total	\$ 265,450
Planning and Administration Expenditures						\$ 37,526
					Percent Administration	14%

TABLE E

PROGRAM INCOME FY 2009-2010						
Principal and Interest	Deferred Loans					\$ 34,521
Repayment:	Low interest loans					\$ 206
					Total	\$ 34,727

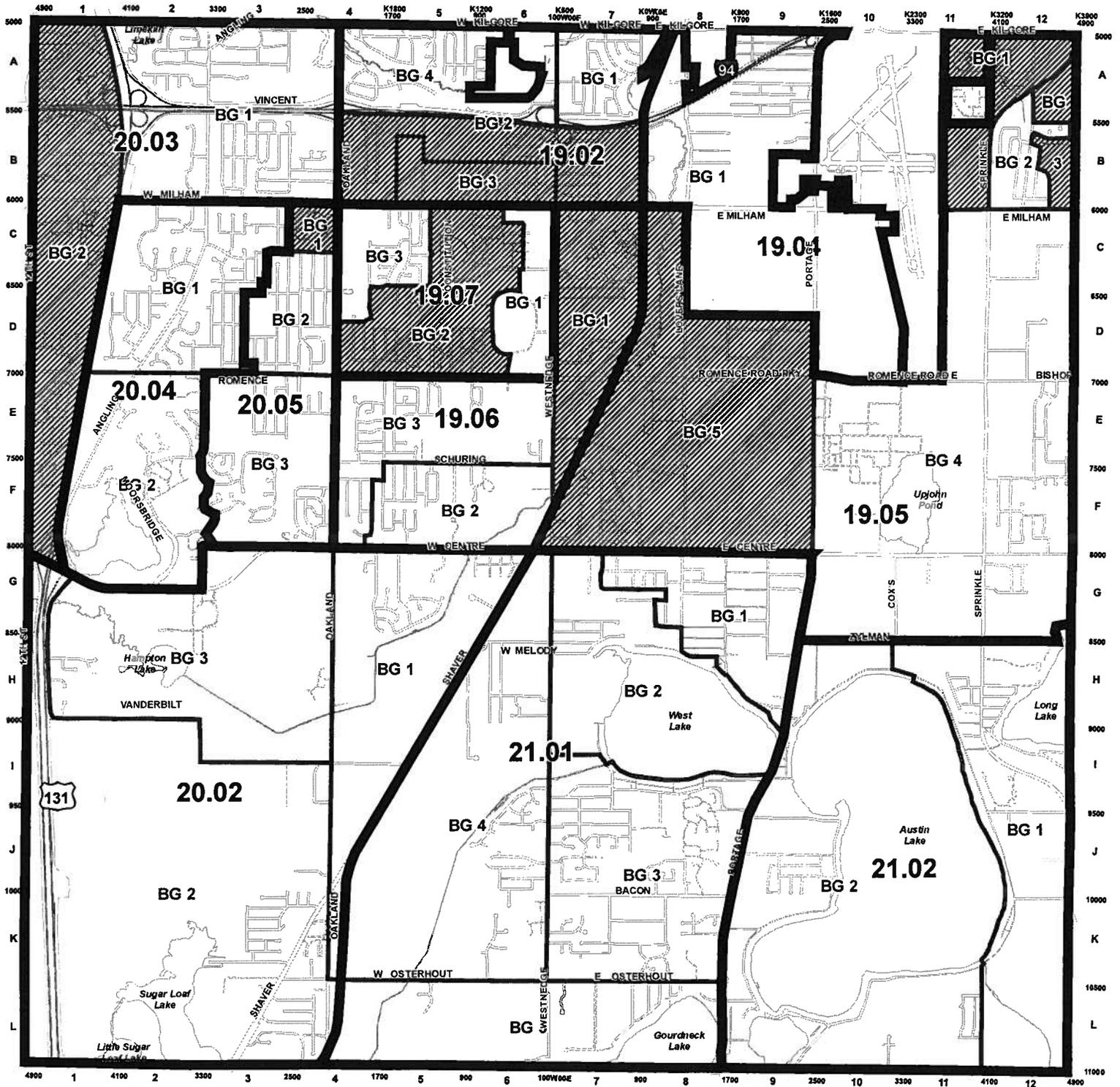
TABLE F

LOANS RECEIVABLE AS OF June 30, 2011 (includes only loan principal)						
Outstanding principal, Deferred Loans			186	loans		\$ 951,915
Outstanding principal, Low Interest Loans			11	loans		\$ 18,908
					Total	\$ 970,823

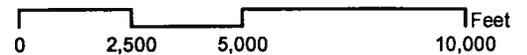
APPENDIX A

MAPS

Low Income Neighborhoods Census Tract / Block Group Map



	CENSUS TRACT BOUNDARY
	BLOCK GROUP BOUNDARY
	LOW INCOME BLOCK GROUPS



APPENDIX B

SUMMARY OF PUBLIC COMMENTS

FY 2010-11 CDBG Consolidated Annual Performance Evaluation Report – Public Hearing:

TO BE COMPLETED AFTER PUBLIC HEARING

APPENDIX C
PROOF OF PUBLICATION

August 13, 2011

**NOTICE OF AVAILABILITY OF THE FY 2010-11
CONSOLIDATED ANNUAL PERFORMANCE
EVALUATION REPORT (CAPER)**

The City of Portage has completed the CAPER for Fiscal Year (FY) 2010-11 covering the period July 1, 2010 – June 30, 2011. The CAPER outlines progress in carrying out the FY 2010-11 Annual Action Plan (the annual element of the five year Consolidated Plan) including the financial resources available and expended during FY 2010-11 as part of the Community Development Block Grant program. The CAPER will be available for review and comment for a minimum 15-day period beginning August 13, 2011 at the following locations:

Portage City Hall, Department of Community Development
7900 South Westnedge Avenue
Portage, Michigan 49002
269-329-4480

Portage District Library, Reference Desk
300 Library Lane
Portage, Michigan 49002
269-329-4546

City of Portage web site: www.portagemi.gov, under Departments, Community Development, Planning, Development and Neighborhood Services, Documents

Written comments or questions regarding the CAPER should be directed to Vicki Georgeau, Director of Community Development, 7900 South Westnedge Avenue, Portage, Michigan 49002 on or before September 1, 2011 to the City of Portage, Department of Community Development, 7900 South Westnedge Avenue, or may be presented in person at a Public Hearing that will be held on Thursday, September 1, 2011 at Portage City Hall, Conference Room #1 at 6:30 p.m. If you need special assistance in order to review the documents please call 329-4477.

Vicki Georgeau, AICP
Director of Community Development

RECEIVED

CITY OF PORTAGE

AUG 19 2011

COMMUNICATION

COMMUNITY DEVELOPMENT

TO: Advisory Board Chairperson*

DATE: August 16, 2011

FROM: Adam Herringa, Deputy City Clerk *AH*

SUBJECT: Approved 2011/2012 City Goals & Objectives

Enclosed is a copy of the 2011/2012 Goals and Objectives approved by City Council at the August 9, 2011, City Council Meeting. Please note the following important dates that are included in the attached Goals and Objectives.

- | | |
|--|----------------------------|
| 1. First Goals Update 2011-2012 | Due in early November 2011 |
| 3. Second Goals Update 2011-2012 | Due in early April 2012 |
| 3. Recommended Goals for Fiscal Year 2012-2013 | Due in early April 2012 |

Please contact the City Clerk Office at (269) 329-4511 if you need assistance or further information.

* Jason Howard, Chair, Environmental Board
Mark Reile, Chair, Historic District Commission
Marc Meulman, Chair, Human Services Board
Mike Zajac, Chair, Park Board
James Cheesebro, Chair, Planning Commission
Ruth Ann Meyer, Chair, Senior Citizens Advisory Board
Sujay Dewan, Chair, Youth Advisory Committee

c: Maurice S. Evans, City Manager
Staff Liaison: Christopher Barnes, Environmental Board
Erica Eklov, Historic District Commission
Vicki Georgeau, Human Services Board ✓
William Deming, Park Board
Chris Forth, Planning Commission
Jason Horan, Senior Citizen Advisory Board

**ADVISORY BOARDS AND COMMISSIONS
APPROVED 2011-2012 GOALS AND OBJECTIVES**

ENVIRONMENTAL BOARD

1. Continue to implement the City Council approved Purple Loosestrife bio-control plan:
 - a. Release additional beetles at appropriate surveyed sites as beetle supplies are available.
 - b. Provide oversight to the work group.
 - c. Submit an annual progress report to the City Council.
2. Enhance environmental quality and protect natural resources.
 - a. Continue to promote effective recycling plans, the use of recycled/recyclable products and responsible disposal of hazardous and solid waste.
 - b. Protect water quality through the continued implementation of water management principles, including surface water, groundwater and storm water programs.
 - c. Promote environmental protection, planning, monitoring and educational programs.
3. Continue working with the City Administration to determine if Single-Stream Recycling is a viable and practical program for the City of Portage.
4. Promote environmental awareness in the community by hosting an annual Earth Day event in conjunction with the Youth Advisory Committee and Parks Board.
5. Advise the City Council in areas / subjects under the purview of the Environmental Board.
6. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).
7. Present an annual verbal report to the City Council.

HISTORIC DISTRICT COMMISSION

1. Safeguard the heritage of the city through the exterior preservation of the historic district by evaluating and considering applications for Certificates of Appropriateness. Identify and evaluate historically significant structures in the City of Portage.
2. Increase visibility and public awareness of the Portage Historic District.
 - a. Continue to interview and transcribe select interviews with historic homeowners and other people knowledgeable about Portage's history.
 - b. Continue with book sales of *Where the Trails Crossed*.
 - c. Continue to support the historic educational programs in the Portage Schools.
 - d. Continue to have communication and cooperation with similar organizations in the local community.
3. Maintain a Library exhibit wall of framed photos representing the history of Portage. Continue to add new material throughout the year. This exhibit will be on display at the Portage District Library.

4. Present a Preservation Award to a citizen who has met the criteria as established by the Portage Historic Commission.
5. Continue the biannual newsletter called *Picket Fences* to be distributed to homeowners of Portage historic homes, councilmembers and other supporters.
6. Observe National Preservation Week in May by presenting a special event in the community.
7. Advise the City Council in areas / subjects under the purview of the Historic District Commission
8. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).
9. Present an annual verbal report to the City Council.

HUMAN SERVICES BOARD

1. Fulfill advisory role requirements for CDBG program and human/public service funding requests.
 - a. Make recommendations regarding the Community Development Block Grant (CDBG) Program.
 - b. Make recommendations regarding human/public service funding from the CDBG Program and General Fund to the City Council
 - Convene public hearings for the CDBG Program Consolidated Plan, Annual Action Plan, and Consolidated Annual Performance Evaluation Report.
 - Hear appeals from the CDBG Housing Program Guidelines.
 - Review fair housing activities.
 - Review applications and presentations from agencies for human/public services and recommend funding levels to City Council.
2. Serve as a resource and provide information to City Council regarding public transportation in the City of Portage.
 - a. Advise City Council on matters pertaining to public transportation in the City of Portage and make recommendations as appropriate.
 - Review public transportation needs within the City of Portage.
 - Review countywide demand/response of transportation services.
3. Serve as a resource to City Council for special projects.
 - a. Take appropriate action on projects as assigned by City Council
 - b. Review mechanisms for identifying human service needs in the community.
 - c. Identify and educate City Council on emerging human service issues in Portage.
 - Continue to serve on Metro Transit ADA Advisory Committee.
 - Assist City Council with Red Ribbon Week activities.
4. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).
5. Present an annual verbal report to the City Council.

PARKS BOARD

1. Continue to participate in Portage cultural and special events as event volunteers and fundraising for marketing efforts. Possible venues include:
 - a. Concerts
 - b. Festivals
 - c. Recreation programs special events
2. Continue implementation of the expanded “Get Active Portage” day at Ramona Park, to include a youth triathlon, health fair and Paddle Fest kayak races.
3. Promote environmental awareness in the community by hosting an annual Earth Day event in conjunction with the Youth Advisory Committee and Environmental Board.
4. Implement a new “Landmark Sculpture” activity for the community to promote recycling. This event would engage participants in creating Kalamazoo County landmarks out of discarded goods and objects.
5. Investigate opportunities to expand the effectiveness and ability to increase park events and activities through volunteer development.
6. Work together with the City Administration to facilitate the development of a Park Master Plan for the Eliason property on Shaver Road.
7. Advise the City Council in areas / subjects under the purview of the Parks Board.
8. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).
9. Present an annual verbal report to the City Council.

PLANNING COMMISSION

1. Continue to guide development to appropriately planned area of the community.
2. During project plan review, consider the following:
 - a. Parking lot interconnection, driveway consolidation, access from adjacent local/collector street or other methods intended to improve traffic flow and safety.
 - b. Adjacent residential neighborhood protection measures.
 - c. Protection of environmentally sensitive areas such as those identified on the City of Portage Sensitive Land Use Inventory Map, including regulated wetlands, groundwater and surface water.
3. Consider and act appropriately upon site-specific re-zonings in the context of the 2008 Comprehensive Plan and the 2008 City Centre Area Plan to encourage residential, commercial, industrial, planned development and high-tech development opportunities, as appropriate.

4. Review / recommend Zoning Code text amendments including, but not limited to, the City Council referred mixed-use ordinances and the Landscaping and Screening ordinance.
5. When appropriate, engage the Youth Advisory Committee in the planning process.
6. Prepare the 2012 Major Thoroughfare Plan (Chapter 8 of the Comprehensive Plan) Status Update.
7. Review and recommend the annual Capital Improvement Program.
8. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).

SENIOR CITIZEN ADVISORY BOARD

1. Help to increase new and renewal membership to 2,000 or more.
2. Help to increase funding for operational support: investigate new ideas and sources of funding in cooperation with the Friends of the Portage Senior Center.
3. Continue development of innovative programming to reach the population of seniors 50 years of age and older.
4. Conduct discussions on specific senior center topics in cooperation with the Friends of the Portage Senior Center and the City Council on the results of the Portage Visioning Project.
5. Advise the City Council and the Portage Senior Center management on issues or projects pertaining to seniors and the Portage Senior Center.
6. Assist with plans to implement suggestions from the accreditation report such as updating technology use and developing plans for expansion of services.
7. Continue to explore opportunities for interaction and partnering with the Portage Community Center.
8. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).
9. Present an annual verbal report to the City Council.

YOUTH ADVISORY COMMITTEE

1. Continue to support educating members of the Youth Advisory committee on the roles and functions of City of Portage Government.
2. Continue a commitment to community service by volunteering time at organizations such as the Portage Community Center. In addition, take the initiative to volunteer in support of other causes as the need may arise.
3. Promote environmental awareness in the community by hosting an annual Earth Day event in conjunction with the Environmental Board and Parks Board.
4. Participate in and support community efforts – specifically those of the Kalamazoo County Substance Abuse Task Force – related to addressing substance abuse in the community.
 - a. Provide teens an opportunity to socialize without the use of drugs and alcohol, including hosting activities such as the Snow Party and Teen Movie Night.
5. Advise the City Council in areas / subjects under the purview of the Youth Advisory Committee.
6. Forward update to goals for FY 2011-12 (November 2011 and April 2012) and recommended goals for FY 2012-13 (April 2012).
6. Present an annual verbal report to the City Council.

MATERIALS TRANSMITTED

Victoria Georgeau - Fwd: Re: Portage City Human Service Board

From: Marc Meulman <marcmeulman@gmail.com>
To: Victoria Georgeau <georgeav@portagemi.gov>
Date: 8/4/2011 7:48 PM
Subject: Fwd: Re: Portage City Human Service Board

----- Forwarded message -----

From: "Marc Meulman" <marcmeulman@gmail.com>
Date: Aug 4, 2011 5:12 PM
Subject: Re: Portage City Human Service Board
To: "Genna Nichols" <gennanichols@gmail.com>

Thank you Genna. We will miss you. I wish you & your family the best.

On Aug 4, 2011 4:40 PM, "Genna Nichols" <gennanichols@gmail.com> wrote:

> Dear Marc,

>
> It has been a great pleasure serving with all of you on the Portage Human
> Services Board. While I have learned much about the organizations and
> programs that exist to support the families and neighbors of our community,
> I have also been happy to learn about the efforts of the City of Portage
> toward improving our community. However, due to the health of my family
> member, I respectfully ask the Board to accept this correspondence as my
> resignation from the Portage Human Services Board.

>
> Again, it has been a pleasure to serve with all of you, and I look forward
> to being able to return to the area to help in the community again. Take
> care, and God bless.

>
> Sincerely,

>
> Genna Nichols