



**Consolidated Annual Performance
and Evaluation Report**
for
Program Year 2019

Tulsa County HOME Consortium

And

Tulsa County Community Development Block
Grant Urban County Program

Prepared by INCOG

December 2020

PROGRAM YEAR 2019

CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT

EXECUTIVE SUMMARY

This Consolidated Annual Performance and Evaluation Report (CAPER) is designed to report on the progress of the Tulsa County HOME Consortium and the Tulsa County Community Development Block Grant (CDBG) Urban County programs in carrying out the housing and community development goals and objectives set out in its Fiscal Year 2019 Annual Action Plan. The Program Year/Fiscal Year for this report began July 1, 2019 and ended June 30, 2020. In addition, this report provides an opportunity for the HOME Consortium and CDBG Urban County programs to assess annual performance in relationship to meeting overall priorities and objectives stated in the Five-year Consolidated Plan, and to discuss what actions or changes are contemplated as a result of annual performance of the programs.

During the 2019 Program Year, through the CARES Act Tulsa County received a special allocation of CDBG-CV funds in the amount of \$861,792 from the Department of Housing and Urban Development to be used to prevent, prepare for, and respond to the coronavirus (COVID-19) and amended its 2019 Annual Action Plan in May 2020 to include the program. Although CDBG CV funds were awarded to subrecipients prior to June 30, 2020, no CDBG-CV funds were expended before June 30th and accomplishments for the CDBG CV program are not covered in this CAPER.

The 24 communities within the HOME Consortium's jurisdictions covered by this CAPER are: Bartlesville, Bixby, Bristow, Broken Arrow, Catoosa, Claremore, Collinsville, Coweta, Drumright, Glenpool, Hominy, Jenks, Owasso, Pawhuska, Sand Springs, Sapulpa, Skiatook, Sperry, and the unincorporated areas of Creek, Osage, Rogers, Tulsa, Wagoner, and Washington Counties. The HOME Consortium receives a direct allocation of HOME Investment Partnership funds from the U.S. Department of Housing and Urban Development.

The Tulsa County CDBG Urban County is comprised of Tulsa County and the Cities of Bixby, Broken Arrow, Collinsville, Glenpool, Jenks, Owasso, Sand Springs, Sapulpa, Skiatook, and Sperry. The Tulsa County CDBG Urban County receives a direct allocation from the U.S. Department of Housing and Urban Development in the Community Development Block Grant Program. HOME Consortium communities that are not a part of the CDBG Urban County may apply for Community Development Block Grants through the State of Oklahoma program administered by the Oklahoma Department of Commerce.

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$1,602,083.58

During the FY 2019 program year, funds were spent on the following HOME activities:

Homebuyer Assistance (Downpayment & Closing Costs):

Fifty-one (51) households were assisted in the purchase of homes through assistance in downpayment and closing cost forgivable loans. Through this program, mortgages in the amount of \$5,069,715.00 were executed with local lending institutions. This was an average mortgage amount of \$99,406.18, an average mortgage amount approximately \$6,610.18 higher than in the FY2018 program year.

Total Expended in Program Year: \$243,004.09

Rental Housing

During the FY2018 program year, funds were awarded to Vintage Housing, Inc. for the energy efficiency rehabilitation of a 20-year old elderly housing apartment complex, Carriage Crossing, located in Coweta, Wagoner County. Construction of capital improvements for the 40-unit building was initiated during the program year and Phase I improvements were completed during the reporting period. The final draw of funds to Vintage Housing for Phase 1 was done in May 2020. The capital improvement projects assisted in continuing to provide safe, energy efficient affordable housing for low-income elderly households.

Total Expended in Program Year: \$1,044,481.60

During the FY2018 program year, funds were awarded to a non-profit organization, Nehemiah Community Development, for Cottages on Sixth Street Phase 2 in Bartlesville, Washington County, new construction of six single family rental units for low income at-risk populations, including single female headed households, disabled and veterans. Construction was initiated during the FY2019 program year, but not completed until November 2020 so no accomplishment data was reported for FY2019.

Total Expended in Program Year: \$207,971.00

HOME Program Administration:

Total Expended in Program Year: \$90,957.16

FY2018: \$58,727.56

FY2019: \$32,229.60

Administration costs of general program; financial and program compliance; development of prospective housing activities.

Tulsa County CDBG Urban County:

Total CDBG Funds Expended During Program Year: \$1,140,024.56

During the program year, funds were spent on the following CDBG activities from FY2015, FY2016, FY2017, FY2018 and FY2019 programs:

2019 Program Year Major Initiatives and Highlights

<u>Program Yr.</u>	<u>Activity #</u>	<u>Activity Name</u>	<u>Status</u>	<u>Expenditures</u>
2018	1362	Broken Arrow East Detroit Street Rehab	Open	\$509,379.15
2018	1302	Sand Springs Park Improvements	Completed	\$41,475.60
2018	1313	Bixby Midland Addition Needles Ave Storm Sewer and ADA Sidewalks	Completed	\$168,555.65
2019	1371	Sand Springs Lincoln Ave Waterline	Open	\$89,742.87
2017	1309	Sperry Sewer Force Main Improvements	Completed	\$68,259.96

Infrastructure

Total Expended:

\$877,413.23

Social Services

Funding to four agencies to provide services to Broken Arrow low income residents
 FY2018: \$42,390.03 (balance from prior program year paid during current program year)
 FY2019: \$52,519.27

Total Expended: \$94,909.30

General Program Administration:

Administration and program compliance activity.
 FY2017 \$ 16,788.10
 FY2018 \$150,913.93

Total Expended: \$167,702.03

CAPER Document:

Copies of this document can be obtained by contacting the INCOG office at Two West Second Street, Suite 800, Tulsa, OK 74103, (918) 584-7526.

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.

Tulsa County CDBG Urban County:

Total CDBG Funds Expended During Program Year: \$1,140,024.56

During the program year, funds were spent on the following CDBG activities from FY2015, FY2016, FY2017, FY2018 and FY2019 programs:

Infrastructure: \$877,413.23

Social Services: \$94,909.30

General Program Administration: \$167,702.03

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$1,602,083.58

Homebuyer Assistance (Downpayment & closing costs): \$243,004.09

Program Income for HBA: \$15,669.73

Innovative Housing Initiatives (New Construction of SF Housing): \$207,971.00

Rental Housing (Rehab of 1 apartment complex): \$1,044,481.60

General Program Administration: \$90,957.16

See uploaded Attachment 1 document 2019 Executive Summary for discussion of major initiatives and highlights of program year.

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
Construction of Public Facilities and Services	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	4100	935	22.80%			
Construction of Public Facilities and Services	Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	200000	81432	40.72%	45749	35534	77.67%
Construction of Public Infrastructure	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	27900	0	0.00%	3282	0	0.00%

Homeownership Opportunities for Low Income	Affordable Housing	HOME: \$	Homeowner Housing Added	Household Housing Unit	0	43		0	38	
Homeownership Opportunities for Low Income	Affordable Housing	HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	180	86	47.78%			
New Construction of Single Family Rental Units	Affordable Housing	HOME: \$	Rental units constructed	Household Housing Unit	15	9	60.00%	20	0	0.00%
Rental Housing for Elderly Households	Affordable Housing	HOME: \$	Rental units rehabilitated	Household Housing Unit	80	40	50.00%	40	0	0.00%

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 Urban County’s CDBG activities are selected by the individual communities who are members of the Urban County, and activities are not priority based.

Because affordable housing for elderly low income households in the region is a stated priority for the HOME Consortium, program efforts were directed to maintaining quality and energy efficient units for the elderly through the funding of the rehabilitation of elderly congregate housing developed by the HOME Consortium over 20 years ago. The number of Homebuyer Assistance units completed during the performance year included units funded with FY2018 funds. The FY2018 HBA units were closed during the 2019 program year.

CR-10 - Racial and Ethnic composition of families assisted

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

91.520(a)

	CDBG	HOME
White	72,480	38
Black or African American	1,691	4
Asian	1,592	1
American Indian or American Native	2,084	7
Native Hawaiian or Other Pacific Islander	3,684	1
Total	81,531	51
Hispanic	1,317	4
Not Hispanic	80,214	47

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

Narrative

In Program Year FY19, the HOME Consortium provided Homebuyer Assistance to 51 households through Community Action Resource and Development (CARD) and Housing Partners of Tulsa. A total of Thirty-eight (38) of the households were identified as White with three (3) of those households identified as White-Hispanic. Seven (7) households were identified as American Indian or Native American, with one (1) reported as American Indian- Hispanic. Four (4) households were Black; one (1) was Asian; and one (1) was reported as Other. Twenty- seven (27) households had children, two were identified as elderly, and seventeen households were identified as single-non elderly. Five households were identified as Other.

The racial and ethnic composition reported in the table above for the HOME and CDBG activities reflect in general the demographic composition of the region. Eighty-eight (88%) of the households assisted were reported as White, with 2% reported as Black/African American, 3% American Indian and 2% Asian. Other racial and ethnic groups combined to total 4%.

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	1,391,322	1,140,024
HOME	public - federal	1,001,261	1,602,083
Other	public - federal	861,792	0

Table 3 - Resources Made Available

Narrative

The Actual Amount Expended is the amount expended on activities during the Performance period, and includes amounts expended from prior years' funding.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description

Table 4 – Identify the geographic distribution and location of investments

Narrative

The Action Plan did not identify Target Areas for distribution of funds. During the performance year, HOME funds were expended in various communities within the HOME Consortium service area of 6 counties and 18 cities. Homebuyer Assistance was provided to purchase homes in Bartlesville (13), Broken Arrow (9), Claremore (9), Coweta (1), Glenpool (3), Sand Springs (3), Sapulpa (9), Skiatook (1), Sperry (1) and rural Creek County (2). Exterior energy efficiency improvements of an elderly housing apartment complex in Coweta were completed. New construction rental single family was started in Bartlesville. CDBG funds were expended in targeted areas determined locally.

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.

Matching funds for the HOME program were generated through foregone T-bill interest rates for the Homebuyer Assistance program. Additionally, many of the CDBG Urban County communities provided leveraged funds to contribute to their projects. Beginning October 1, 2018 through September 30, 2020, a Presidential Declaration of a Major Disaster under the Robert T. Stafford Act for damage resulting from severe storms was in effect for HOME expenditures in Osage, Tulsa, and Wagoner Counties. Therefore, expenditures in the amount of \$1,044,481.60 for the Carriage Crossing elderly housing rehabilitation in Wagoner County,

had a match waiver. Additionally, through waivers associated with the CARES Act which waived all match requirements for the HOME program, the HOME Consortium’s Match Liability was reduced to \$-0-.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	3,083,787
2. Match contributed during current Federal fiscal year	66,605
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	3,150,392
4. Match liability for current Federal fiscal year	0
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	3,150,392

Table 5 – Fiscal Year Summary - HOME Match Report

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match
HBA DPA	7/1/2019 to 6/30/2020		\$66,605					\$66,605.00

Table 6 – Match Contribution for the Federal Fiscal Year

HOME MBE/WBE report

Program Income – Enter the program amounts for the reporting period				
Balance on hand at beginning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
0	\$15,732.65	\$15,732.650	0	0

Table 7 – Program Income

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period

	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Contracts						
Dollar Amount	0	0	0	0	0	0
Number	0	0	0	0	0	0
Sub-Contracts						
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0
	Total	Women Business Enterprises	Male			
Contracts						
Dollar Amount	0	0	0			
Number	0	0	0			
Sub-Contracts						
Number	0	0	0			
Dollar Amount	0	0	0			

Table 8 - Minority Business and Women Business Enterprises

Minority Owners of Rental Property – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted

	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

Table 9 – Minority Owners of Rental Property

Relocation and Real Property Acquisition – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition

Parcels Acquired		0	0			
Businesses Displaced		0	0			
Nonprofit Organizations Displaced		0	0			
Households Temporarily Relocated, not Displaced		0	0			
Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

Table 10 – Relocation and Real Property Acquisition

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	0	0
Number of Non-Homeless households to be provided affordable housing units	0	0
Number of Special-Needs households to be provided affordable housing units	20	0
Total	20	0

Table 11 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	0
Number of households supported through The Production of New Units	20	6
Number of households supported through Rehab of Existing Units	40	0
Number of households supported through Acquisition of Existing Units	0	51
Total	60	57

Table 12 – Number of Households Supported

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

There were 51 homebuyer locations in the FY19 HOME Program through CARD-Community Action Resource & Development, Inc. and Housing Partners of Tulsa. These units were assisted under FY2017 and FY2018 HOME funding. The 20 units listed as the one-year goal for the the production of new units reflects the development of single family rental units in Bartlesville. Six of these units were under construction during the program year, but final draw and completion occurred in November 2020. Client information will be entered into IDIS during the FY2020 program year. The 40 units listed as the Rehab of Existing Units is the rehabilitation of Carriage Crossing in Coweta. This activity was completed in March 2020, but the client information has not been entered into IDIS yet.

Discuss how these outcomes will impact future annual action plans.

The HOME Consortium feels that goals developed are on track for the affordable housing market in the region, and no changes are anticipated.

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

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	253	23
Low-income	35,281	15
Moderate-income	0	13
Total	35,534	51

Table 13 – Number of Households Served

Narrative Information

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

Three different Continuum of Care organizations cover the geographic area of the Tulsa Metropolitan HOME Consortium. Tulsa-Tulsa County-Broken Arrow combine to form an urban Continuum of Care. Creek and Osage Counties are part of the rural North Central Oklahoma CoC. Rogers, Wagoner, and Washington Counties are part of the rural Northeast Oklahoma CoC. In January 2020, the Tulsa City & County Continuum of Care, known as A Way Home for Tulsa, reconstituted and adopted a new Governance Charter. A new Leadership Council, which serves as the board of AWH4T, was formed to oversee the Tulsa-Tulsa County Continuum of Care process. The Leadership Council is comprised of four Appointed Members; five Elected Members who are providers; and six Invited Members from various advocacy groups. A Senior management staff member of the INCOG Community Development department was appointed to the Leadership Council, as well as a Tulsa County Commissioner. In addition, INCOG staff members participate each January in the *One-night Consumer Survey* or PIT- "Point-in-Time" count of the Tulsa area homeless population. The INCOG staff focuses on the City of Broken Arrow during the One-night survey.

An INCOG staff member participates with local volunteers each January in the One-night Consumer Survey or the "Point in Time Count" of the local homeless population. INCOG coordinates the survey in the City of Broken Arrow and consults with Broken Arrow Neighbors on locations and situations to be checked on the night of the survey. In addition, the Homeless Outreach Team Coordinator contacted the Broken Arrow Police Department to see if there were other locations to be checked. The 2020 PIT Survey was held on the night of January 23, 2020. There were no persons counted as homeless in Broken Arrow on that evening. Other locations in Greater Tulsa that were checked included HUD Permanent Supportive housing locations; Veteran's housing programs such as HUD VASH; and Safe Haven and Transitional Housing programs. Jail and Detox treatment facilities were also counted. The 2020 PIT Survey was conducted state-wide, despite the challenges of the restrictions imposed by the COVID pandemic. The North Central CoC did not count any unsheltered homeless in Creek or Osage Counties, and there are no shelters in those two counties.

Addressing the emergency shelter and transitional housing needs of homeless persons

The MTHC Consortium does not receive Emergency Solutions Grant (ESG) funding. The MTHC Consortium does not allocate or receive funding from the Tulsa-Tulsa County-Broken Arrow CoC - Continuum of Care or any other CoC. INCOG staff members do participate in the local meetings of the Leadership Council of AWH4T-A Way Home for Tulsa. The emergency shelters that serve the City of Tulsa also serve the suburban areas of Tulsa County. Some of the shelters serve clients from outlying

communities in Northeastern Oklahoma. The provider agencies that are members of the AWH4T all provide some level of emergency and transitional housing with the goal of finding permanent housing for all of their clients.

Tulsa County used CDBG CV allocations to fund the Emergency Overflow Shelter opened to create additional housing for homeless populations so that proper social distancing protocols could be observed. Tulsa Day Center and The Salvation Army were awarded funds to operate the Emergency Shelter. CDBGCV funds were expended in July 2020, outside of the FY2019 program year.

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

In past years, the MTHC Consortium did not receive or allocate funding for housing activities that impacted the lives of homeless persons or at-risk/potentially homeless individuals and families. During the FY2019 program year, though, CDBG CV funding was awarded to address homeless populations.

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

In past years, the MTHC Consortium did not receive or allocate funding for housing activities that impacted the lives of homeless persons or at-risk/potentially homeless individuals and families. During the FY2019 program year, though, CDBG CV funding was awarded to address homeless populations. INCOG staff members will continue to be involved with the AWH4T Leadership Council and the urban Tulsa-Tulsa County-Broken Arrow CoC. INCOG staff will maintain contacts with the two adjacent rural Continuum of Care organizations in order to address these issues.

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

Actions taken to address the needs of public housing

There are three public housing authorities in the MTHC Consortium Area: Bristow, Drumright, and Osage County. The Bristow PHA has 159 units, the Drumright PHA has 148 units, and the Osage County PHA has 280 units at six individual locations: Barnsdall, Cedar Ridge near Pawhuska, Fairfax, Hominy, Osage, and Shidler. The three public housing authorities in the MTHC area received annual Public Housing Capital Fund Program grants (CAP awards) for the continued maintenance and upgrade of their housing units. There are no plans to expand the current number of units at these locations. The MTHC Consortium is not a funding source for public housing agencies.

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

Any actions in this area would be initiated by the individual housing authorities.

Actions taken to provide assistance to troubled PHAs

None of the three Public Housing Authorities in the MTHC Consortium Area are designated as troubled PHA's.

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)

Fair Housing education is an important first step in eliminating any barriers to affordable housing that may be encountered by low income and minority citizens. Cities and counties in the HOME Consortium all participate in the promotion of fair housing within their communities. All 24 local governments are current or former recipients of CDBG funds and have conducted activities to promote fair housing. Such activities have included promoting April as Fair Housing Month, adopting or updating local Fair Housing Ordinances, and making available a Fair Housing Brochure.

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

No additional actions undertaken.

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

Tulsa County staff provided technical assistance to the Tulsa Health Department in the administration of the HUD Healthy Homes Lead Paint Reduction grant awarded to the THD. No households were remediated during the program year.

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

During the FY2019 reporting period, Community Action Project Tulsa County (CAPTC) and Community Resource Development, Inc. (CARD) offered various programs in the MTHC Consortium area: Head Start provides comprehensive services in health/nutrition, parent involvement, disabilities, family literacy, social services and education. The Weatherization Program provides energy related cost cutting measures in older homes. Community Outreach and Development increases the level of self-sufficiency for low-income individuals and groups through development of the self-help and management skills needed to operate effectively. Services include In-home care, educational programs, community organization, information and referral and community networking. Youth Programs are designed to create employment and training opportunities for low income youths. The CARD Homeless Program provides financial assistance, case management, counseling and available resources to individuals and families who are homeless or at risk of being homeless. Emergency Assistance provides food, shelter, utility assistance, clothing, medical treatment and support for individuals and families in emergency situations. Economic Development offers employment/ career counseling and training, assistance in business development and an entrepreneurial development support system. The Senior Nutrition and wellness program offers meals, transportation and social activities to area senior citizens. Finally, the CARD Referral system is an extensive referral system which contains information on employment,

housing services, emergency services, lists of other social service agencies and the services they provide.

CAPTC has several programs that help low-income families develop assets and use them effectively so they may rise above the poverty level. CARD in Claremore provides social services to clients.

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

No gaps in institutional structure were identified in the FY19 Annual Action Plan. No changes are contemplated at this time.

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

Tulsa County participated in the A Way Home 4 Tulsa Leadership Council and the efforts by all involved social service agencies to address the critical issue of COVID-related evictions.

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 HOME Consortium is a member of the Tulsa Area Fair Housing Partnership, a collaboration of local entities and agencies whose mission is to raise awareness of the right to equal opportunity in housing of all people in the metropolitan Tulsa area. During the reporting period, the Partnership assessed impediments to fair housing choices and directed efforts towards a variety of significant and high profile events and activities to bring attention to equal housing opportunity. Additionally, during the reporting period, each of the Urban County jurisdictions and all of the HOME Consortium member governments re-affirmed affirmatively furthering fair housing by adopting a resolution proclaiming April as Fair Housing Month.

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

Tulsa County has adopted monitoring policies and procedures, which detail frequency and standards for monitoring by staff. CDBG funds are monitored with each draw request, and HOME housing units are monitored every three years. INCOG Staff members conducted five on-site monitoring visits to CDBG Urban County cities where CDBG funds were expended during FY 2019: Bixby, Sand Springs and Sperry. The purpose of the monitoring visits was to review original source documentation for the City's payments to contractors on CDBG projects within 30 days of payment. In the HOME Program, an onsite monitoring visit to CARD -Community Action Resource and Development in Claremore was conducted on June 17, 2020 to review the CARD Homebuyer Assistance program.

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.

Following the adopted Tulsa County Citizens Participation Plan, a public hearing to review the FY 2019 performance of the HOME Consortium and the CDBG Urban County was held during the regular Tulsa County Board of Commissioners meeting on Monday, December 7, 2020. Notification of the public hearing was published in the regional *Tulsa World* newspaper 14 days prior to the hearing, and posted on the Tulsa County website and the INCOG website. Additionally, copies of the draft CAPER were posted on the Tulsa County and INCOG websites to allow public review of the document.

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 Urban County program focused efforts during the FY 2019 program year on encouraging participating jurisdictions to speedily expend grant funds, despite the challenges imposed on city governments and construction contracts by the COVID pandemic. A review of the PR56 CDBG Timeliness Report on May 1, 2020 showed a 1.56 Draw Ratio for Tulsa County. The minimum disbursement to meet the test was \$87,912, and Tulsa County did not draw this amount prior to the test date of May 2nd. Tulsa County felt that the lack of timeliness resulted from factors (COVID-19 pandemic) beyond the grantee's reasonable control, and HUD concurred and did not penalize the County.

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-50 - HOME 91.520(d)

Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations

Please list those projects that should have been inspected on-site this program year based upon the schedule in §92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

Per 92.504(d), on-site inspections must occur at least once every 3 years during the period of affordability. In May 2018 (previous year's reporting period), INCOG staff conducted on-site physical inspections of all 12 Vintage Housing elderly apartments and did monitoring of client files for income eligibility and rent calculations. Per our schedule, the next inspections are due in May 2021.

Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 92.351(b)

The Metropolitan Tulsa HOME Consortium developed and adopted an affirmative marketing plan in accordance with 24 CFR. 92.351 (b). Additionally, the Consortium has approved separate marketing plans for all of the affordable housing developments funded with Consortium funds. All marketing plans are consistent with the affirmative marketing plan requirements specified in federal requirements.

Refer to IDIS reports to describe the amount and use of program income for projects, including the number of projects and owner and tenant characteristics

During the 2019 Program Year, the HOME Consortium used \$15,732.65 in program income to assist five households with a portion of their Homebuyer Assistance downpayment and closing costs.

Describe other actions taken to foster and maintain affordable housing. 91.220(k) (STATES ONLY: Including the coordination of LIHTC with the development of affordable housing). 91.320(j)

The HOME Consortium accepted RFPs from non-profit developers during the FY2019 program period to create affordable housing units for special needs populations in partnership with Federal Home Loan Bank Topeka's Affordable Housing Program. However, this application for the AHP grant was not awarded funding by FHLBTopeka, and the HOME Consortium fully funded the activity of the Cottages on Sixth. This project is underway during the FY2019 program period.

Attachment

2019 CAPER Executive Summary



**Consolidated Annual Performance
and Evaluation Report**
for
Program Year 2019

Tulsa County HOME Consortium

And

Tulsa County Community Development Block
Grant Urban County Program

Prepared by INCOG

December 2020

CAPER

24

PROGRAM YEAR 2019
CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT
EXECUTIVE SUMMARY

This Consolidated Annual Performance and Evaluation Report (CAPER) is designed to report on the progress of the Tulsa County HOME Consortium and the Tulsa County Community Development Block Grant (CDBG) Urban County programs in carrying out the housing and community development goals and objectives set out in its Fiscal Year 2019 Annual Action Plan. The Program Year/Fiscal Year for this report began July 1, 2019 and ended June 30, 2020. In addition, this report provides an opportunity for the HOME Consortium and CDBG Urban County programs to assess annual performance in relationship to meeting overall priorities and objectives stated in the Five-year Consolidated Plan, and to discuss what actions or changes are contemplated as a result of annual performance of the programs.

During the 2019 Program Year, through the CARES Act Tulsa County received a special allocation of CDBG-CV funds in the amount of \$861,792 from the Department of Housing and Urban Development to be used to prevent, prepare for, and respond to the coronavirus (COVID-19) and amended its 2019 Annual Action Plan in May 2020 to include the program. Although CDBG CV funds were awarded to subrecipients prior to June 30, 2020, no CDBG-CV funds were expended before June 30th and accomplishments for the CDBG CV program are not covered in this CAPER.

The 24 communities within the HOME Consortium's jurisdictions covered by this CAPER are: Bartlesville, Bixby, Bristow, Broken Arrow, Catoosa, Claremore, Collinsville, Coweta, Drumright, Glenpool, Hominy, Jenks, Owasso, Pawhuska, Sand Springs, Sapulpa, Skiatook, Sperry, and the unincorporated areas of Creek, Osage, Rogers, Tulsa, Wagoner, and Washington Counties. The HOME Consortium receives a direct allocation of HOME Investment Partnership funds from the U.S. Department of Housing and Urban Development.

The Tulsa County CDBG Urban County is comprised of Tulsa County and the Cities of Bixby, Broken Arrow, Collinsville, Glenpool, Jenks, Owasso, Sand Springs, Sapulpa, Skiatook, and Sperry. The Tulsa County CDBG Urban County receives a direct allocation from the U.S. Department of Housing and Urban Development in the Community Development Block Grant Program. HOME Consortium communities that are not a part of the CDBG Urban County may apply for Community Development Block Grants through the State of Oklahoma program administered by the Oklahoma Department of Commerce.

Tulsa County HOME Consortium:

Total HOME Funds Expended During Program Year: \$1,602,083.58

During the FY 2019 program year, funds were spent on the following HOME activities:

Homebuyer Assistance (Downpayment & Closing Costs):

Fifty-one (51) households were assisted in the purchase of homes through assistance in downpayment and closing cost forgivable loans. Through this program, mortgages in the amount of \$5,069,715.00 were executed with local lending institutions. This was an average mortgage amount of \$99,406.18, an average mortgage amount approximately \$6,610.18 higher than in the FY2018 program year.

Total Expended in Program Year: \$243,004.09

Rental Housing

During the FY2018 program year, funds were awarded to Vintage Housing, Inc. for the energy efficiency rehabilitation of a 20-year old elderly housing apartment complex, Carriage Crossing, located in Coweta, Wagoner County. Construction of capital improvements for the 40-unit building was initiated during the program year and Phase I improvements were completed during the reporting period. The final draw of funds to Vintage Housing for Phase 1 was done in May 2020. The capital improvement projects assisted in continuing to provide safe, energy efficient affordable housing for low-income elderly households.

Total Expended in Program Year: \$1,044,481.60

During the FY2018 program year, funds were awarded to a non-profit organization, Nehemiah Community Development, for Cottages on Sixth Street Phase 2 in Bartlesville, Washington County, new construction of six single family rental units for low income at-risk populations, including single female headed households, disabled and veterans. Construction was initiated during the FY2019 program year, but not completed until November 2020 so no accomplishment data was reported for FY2019.

Total Expended in Program Year: \$207,971.00

HOME Program Administration:

Total Expended in Program Year: \$90,957.16

FY2018: \$58,727.56

FY2019: \$32,229.60

Administration costs of general program; financial and program compliance; development of prospective housing activities.

Tulsa County CDBG Urban County:

Total CDBG Funds Expended During Program Year: \$1,140,024.56

During the program year, funds were spent on the following CDBG activities from FY2015, FY2016, FY2017, FY2018 and FY2019 programs:

2019 Program Year Major Initiatives and Highlights

<u>Program Yr.</u>	<u>Activity #</u>	<u>Activity Name</u>	<u>Status</u>	<u>Expenditures</u>
2018	1362	Broken Arrow East Detroit Street Rehab	Open	\$509,379.15
2018	1302	Sand Springs Park Improvements	Completed	\$41,475.60
2018	1313	Bixby Midland Addition Needles Ave Storm Sewer and ADA Sidewalks	Completed	\$168,555.65
2019	1371	Sand Springs Lincoln Ave Waterline	Open	\$89,742.87
2017	1309	Sperry Sewer Force Main Improvements	Completed	\$68,259.96

Infrastructure

Total Expended:

\$877,413.23

Social Services

Funding to four agencies to provide services to Broken Arrow low income residents
 FY2018: \$42,390.03 (balance from prior program year paid during current program year)
 FY2019: \$52,519.27

Total Expended: \$94,909.30

General Program Administration:

Administration and program compliance activity.
 FY2017 \$ 16,788.10
 FY2018 \$150,913.93

Total Expended: \$167,702.03

CAPER Document:

Copies of this document can be obtained by contacting the INCOG office at Two West Second Street, Suite 800, Tulsa, OK 74103, (918) 584-7526.

2019 Public Hearing Proof

NOCC-MH-LM617007R
 1000017
 ATTN: DEPT. 11A
 222ND ST # 802
 TULSA, OK 74104-4228

TULSA WORLD

PC Box 1770 Tulsa, Oklahoma 74102-1770 tulsaworld.com

Account Number
1009017

Date
November 19, 2020

Date	Category	Description	Ad Size	Total Cost
11/19/2020	Legal Notice	PLS. TO: WFA8160	2.5 x 8.00 C.	48.84

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NOTICE OF PUBLIC HEARING
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Affidavit of Publication

I, Elizabeth Foley Coover, of legal age, in a legal representative of the Tulsa World of Tulsa, Oklahoma, a daily newspaper of general circulation in Tulsa County, Oklahoma, a self-empowered certified public legal notice, do hereby certify that the above-mentioned notice, and all other notices in or from the above-mentioned newspaper, which reference to legal publication, was published in the regular edition of said newspaper during the period and time of publication and set in a supplement, on the DATE(S) LISTED BELOW:

11/19/2020
 Newspaper reference: 6006729869

M. Marshall
 Legal Representative

Swears to truth subscribed before me this date: 11-19-20
Elizabeth Foley Coover
 Notary Public

My Commission expires Oct 13, 2024

ELIZABETH FOLEY COOVER
 NOTARY PUBLIC
 4010 UNIVERSITY AVENUE, SUITE 101
 TULSA, OKLAHOMA 74112
 COMMISSION # 20012872

PR23 CDBG Summary of Accomplishments



U.S. Department of Housing and Urban Development
Office of Community Planning and Development
Integrated Disbursement and Information System
CDBG Summary of Accomplishments
Program Year: 2019

DATE: 12-07-20
TIME: 12:05
PAGE: 1

TULSA COUNTY

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

Activity Group	Activity Category	Open Activities		Completed Count	Completed Activities	Program Year Count	Total Activities Disbursed
		Open Count	Disbursed				
Public Facilities and Improvements	Parks, Recreational Facilities (03F)	0	\$0.00	1	\$41,475.60	1	\$41,475.60
	Flood Drainage Improvements (03I)	0	\$0.00	1	\$168,555.65	1	\$168,555.65
	Water/Sewer Improvements (03J)	0	\$0.00	2	\$158,002.83	2	\$158,002.83
	Street Improvements (03K)	1	\$509,379.15	0	\$0.00	1	\$509,379.15
	Total Public Facilities and Improvements	1	\$509,379.15	4	\$368,034.08	5	\$877,413.23
Public Services	Senior Services (05A)	2	\$23,771.75	2	\$12,696.13	4	\$36,467.88
	Abused and Neglected Children (05N)	1	\$12,471.02	1	\$19,379.00	2	\$31,850.02
	Other Public Services Not Listed in 05A-	1	\$16,276.50	1	\$10,314.90	2	\$26,591.40
		Total Public Services	4	\$52,519.27	4	\$42,390.03	8
General Administration and Planning	General Program Administration (21A)	1	\$150,913.93	1	\$16,788.10	2	\$167,702.03
		Total General Administration and Planning	1	\$150,913.93	1	\$16,788.10	2
Grand Total		6	\$712,812.35	9	\$427,212.21	15	\$1,140,024.56

CDBG Sum of Actual Accomplishments by Activity Group and Accomplishment Type

Activity Group	Matrix Code	Accomplishment Type	Completed Count		Program Year Totals
			Open Count	Count	
Public Facilities and Improvements	Parks, Recreational Facilities (03F)	Public Facilities	0	705	705
	Flood Drainage Improvements (03I)	Public Facilities	0	91	91
	Water/Sewer Improvements (03J)	Persons	0	1,881	1,881
	Street Improvements (03K)	Persons	0	0	0
	Total Public Facilities and Improvements		0	2,677	2,677
Public Services	Senior Services (05A)	Persons	35,193	45,597	80,790
	Abused and Neglected Children (05N)	Persons	72	104	176
	Other Public Services Not Listed in 05A-05Y, 03T	Persons	269	301	570
		Total Public Services		35,534	46,002
Grand Total			35,534	48,679	84,213

CDBG Beneficiaries by Racial / Ethnic Category

Housing-Non Housing	Race	Total Persons	Total Hispanic Persons	Total Households	Total Hispanic Households
Non Housing	White	72,480	1,317	0	0
	Black/African American	1,691	0	0	0
	Asian	1,592	0	0	0
	American Indian/Alaskan Native	2,084	0	0	0
	Native Hawaiian/Other Pacific Islander	64	0	0	0
	American Indian/Alaskan Native & White	1,738	0	0	0
	Other multi-racial	1,887	0	0	0
	Total Non Housing	81,536	1,317	0	0
Grand Total	White	72,480	1,317	0	0
	Black/African American	1,691	0	0	0
	Asian	1,592	0	0	0
	American Indian/Alaskan Native	2,084	0	0	0
	Native Hawaiian/Other Pacific Islander	64	0	0	0
	American Indian/Alaskan Native & White	1,738	0	0	0
	Other multi-racial	1,887	0	0	0
	Total Grand Total	81,536	1,317	0	0

CDBG Beneficiaries by Income Category

	Income Levels	Owner Occupied	INSTANT Occupied	Persons
Non Housing	Extremely Low (<=30%)	0	0	253
	Low (>30% and <=50%)	0	0	35,281
	Mod (>50% and <=80%)	0	0	0
	Total Low-Mod	0	0	35,534
	Non Low-Mod (>80%)	0	0	0
	Total Beneficiaries	0	0	35,534

PR23 HOME Summary of Accomplishments



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

Program Year: 2019
 Start Date 01-Jul-2019 - End Date 30-Jun-2020

TULSA COUNTY CONSORTIUM Home Disbursements and Unit Completions

Activity Type	Disbursed Amount	Units Completed	Units Occupied
First Time Homebuyers	\$258,736.74	51	51
Total, Homebuyers and Homeowners	\$258,736.74	51	51
Grand Total	\$258,736.74	51	51

Home Unit Completions by Percent of Area Median Income

Activity Type					Units Completed
	31% - 50%	51% - 60%	61% - 80%	Total 0% - 60%	Total 0% - 80%
First Time Homebuyers	16	14	21	30	51
Total, Homebuyers and Homeowners	16	14	21	30	51
Grand Total	16	14	21	30	51

Home Unit Reported As Vacant

Activity Type	Reported as Vacant
First Time Homebuyers	0
Total, Homebuyers and Homeowners	0
Grand Total	0

Home Unit Completions by Racial / Ethnic Category

	First Time Homebuyers	
	Completed	Completed -
White	39	3
Black/African American	4	0

Asian	1	0
American Indian/Alaskan Native	6	0
American Indian/Alaskan Native & White	1	1
Total	51	4

	Homeowners		Grand Total	
	Completed	Completed -	Completed	Completed -
White	39	3	39	3
Black/African American	4	0	4	0
Asian	1	0	1	0
American Indian/Alaskan Native	6	0	6	0
American Indian/Alaskan Native & White	1	1	1	1
Total	51	4	51	4