

# **CITY OF MONTEREY**

## **FY 2013-14 CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER) (PROGRAM YEAR 2013)**



Prepared by: City of Monterey  
Housing and Property Management Division  
699 Van Buren Street, Monterey CA 93940  
(831) 646-3995

September 18, 2014



# TABLE OF CONTENTS

<b>Executive Summary</b>	<b>1</b>
<b>CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)</b>	<b>4</b>
<b>I. RESOURCES AVAILABLE WITHIN THE JURISDICTION</b>	<b>4</b>
A. Community Development Block Grant (CDBG)	4
B. Successor Housing Agency (RDA- Housing Trust)	4
C. HOME Investment Partnership (HOME)	5
<b>II. LEVERAGING RESOURCES</b>	<b>5</b>
A. Community Development Block Grant (CDBG) –Major Expenditures	5
B. Former Redevelopment Agency Housing Set-Aside Expenditures	8
C. HOME Investment Partnerships (HOME) Major Expenditures	9
<b>III. SUMMARY OF OVERALL PROGRESS</b>	<b>9</b>
A. Assessment of Strategic Plan Goals and Objectives	9
B. Consolidated Plan Priorities	12
C. Summary of Goals Addressing Consolidated Plan Priorities	12
D. Performance Measurement	15
E. Affirmatively Furthering Fair Housing and Equal Opportunity	17
F. Continuum of Care	18
G. Anti-Poverty Strategy	19
<b>IV. MONITORING &amp; SELF EVALUATION OF 1-YEAR PERFORMANCE</b>	<b>20</b>
<b>Appendices – EXHIBITS</b>	
<b>(Exhibits to be included at later date)</b>	
A	CAPER Certification Statement
B	Demographic Data: Clients Served
C	Fair Housing Accomplishments
D	Summary of Activities and Outcomes
E	Financial Summary: PR 26
F	Public Participation – Public Hearing Notices and Public Comments
G	IDIS Reports PR 06 and PR 23

## EXECUTIVE SUMMARY

The Consolidated Annual Performance and Evaluation Report (CAPER) is required by the U.S. Department of Housing and Urban Development (HUD) to be prepared annually for the receipt and expenditure of Community Development Block Grant (CDBG) funds. This report measures the City of Monterey's progress in reaching the goals and objectives outlined in the City's adopted Five-Year Consolidated Plan (Consolidated Plan) and Annual Action Plan, which are both required by HUD for receipt of federal funds. It also is required to report on progress in addressing the Impediments to Fair Housing contained in the Consolidated Plan and affirmatively furthering fair housing.

Additionally, the CAPER identifies other funds that leverage the CDBG funds in support of housing activities, including former redevelopment housing set-aside funds (now known as Successor Housing Agency (SHA) Funds) and State HOME funds. This CAPER covers Program Year 2013, which is Fiscal Year (FY) 2013/2014. Program Year 2013 began on July 1, 2013 and ended on June 30, 2014. The following pages contain detailed text and charts that report the outcomes of the various City of Monterey Housing and Community Development (HCD) programs for this period that are funded through use of CDGB, HOME or SHA funds.

During Program Year 2013, the City of Monterey's priorities and implementation activities remained consistent with the Consolidated Plan adopted in FY 2009/2010. This program year reports on the City's fourth year progress in meeting the goals and objectives in the Consolidated Plan.

In Program Year 2013, the City of Monterey continued existing programs, with emphasis on homeless services, affordable home sales to first time Low-Income homebuyers at 565 English Avenue, community services to assist senior and disabled households, and housing rehabilitation services to assist low-income senior and disabled households remain in their housing. Efforts to develop a Low-Income senior rental project on City Owned land in the 600 Block of Van Buren Street were continued. The Van Buren property was purchased with CDBG funds. The City intends development of a 19-unit apartment project on the property that will achieve a Low and Moderate Income National Objective.

### **Major accomplishments**

- Spent \$71,500 in CDBG funded community services grants to eight local non-profit agencies that provided assistance to Low and Moderate-Income individuals and families. An additional \$37,157 in SHA funds supplemented these community service activities. A total of 1577 individuals were provided services through use of these funds. Services provided included: assistance for those experiencing homelessness; rental assistance; assistance to disabled individuals; meal delivery for seniors; supplemental food assistance; and senior advocacy/legal aid. Exhibit B identifies the funded agencies and the populations served.
- Conducted outreach regarding City of Monterey programs and targeted code enforcement efforts to low-income, high-density census tracts, i.e., Census Tract 133 that contains 43.4% low-income households. Provided \$67,000 of CDBG funding for an accessible sidewalk improvement project along the 800 Block of Casanova Avenue, which is located in the Casanova Oak Knoll Neighborhood Improvement District (CONA). Expended \$4,124 for clean-up effort and outreach in the CONA neighborhood.

- Maintained the Voluntary Rental Guidelines Program, which was developed to address the issue of rent increases, landlord/tenant disputes, and to monitor and resolve fair housing complaints. When appropriate, landlord/tenant disputes were referred to the Legal Services for Seniors or the Mandell Gisnet Center for Conflict Management at Monterey College of Law.
- Provided 2 major housing rehabilitation loans and 23 housing rehabilitation grants for a total direct expenditure on improvement projects of \$210,000.00. These CDBG expenditures assisted senior and disabled households to remain in their homes through the Major Rehabilitation Loan, Mr. Fix-it repairs, Home Safety and the Handicapped Accessibility Programs. The rehabilitation program supports City housing goals and the HUD national objective to benefit low and moderate-income persons.
- Prepared and published a Request for Qualifications soliciting proposals from developers to enter into exclusive negotiations to develop the senior housing project on Van Buren Street. City Council review for selection of the developer for an Exclusive Negotiating Agreement is tentatively scheduled for September 16, 2014. As required by HUD the City also established a Payment Bond Certificate in the amount of \$1,343,209 as security for reimbursement of CDBG funds in the event the Van Buren Project does not proceed.
- Completed the sale of 5 City owned deed restricted, below market rate Low and Moderate Income Housing (LMIH) units at 565 English Avenue. Four of these units were purchased by the City with CDBG funds. Sale of the units to first time, Low-Income qualified households achieved the HUD national objective to benefit low and moderate-income persons. The sale of the 4 CDBG purchased units produced \$373,722 in program income.
- Conducted outreach regarding City of Monterey low-income housing rehabilitation programs in the CONA and provided funding for targeted code enforcement efforts to low-income, high-density Census Tract 133. Census Tract 133 contains 43.4% low-income households. Through this targeted code enforcement effort the City addressed 67 code violations in the CONA area with a total of 67 code violations resolved.
- Continued work to complete the Monterey Hotel apartments. Staff worked with Rabobank, the Court appointed Receiver and the property owner PRI, LLC, to develop a strategy and funding to ensure completion of the project. Additionally, staff was able to resolve State of California Department of Finance (DOF) questions regarding the continued use of former Redevelopment Agency funds to complete the eighteen (18) affordable apartment units that make up the residential component of the project. Funding for the Monterey Hotel apartments will be Successor Housing Agency funds and there will be no CDBG funds programmed for the project.

#### Summary: CDBG Funds

Entitlement Grant	Unexpended 2013/14 Entitlement	Program Income 2013/14	Carry over PI from 2012/2013	Expenditures 2013/14	Carry Forward to FY 2013/2014
\$181,774	\$175,181	\$1,311,135	\$386,635	\$782,521	\$528,613

The total expended CDBG funds in Fiscal Year 2013/14 was \$782,521.

On September 23, 2014, the City of Monterey's Planning Commission held a public hearing to solicit public comments and consider approval of this report. The Draft CAPER was published on the City's Website, and public review copies made available in four places: the Library; the City Clerk's Office; the Planning Division Office; and the Housing and Property Management Offices. The Notice of the Public Hearing was published in the Monterey Herald in English and Spanish on September 6, 2014.

As of September 29, 2014 there have been no public comments or inquiries received by the City of Monterey with regards to the CAPER. Therefore, the Housing and Property Management Office did not include any response to comments or questions in the final CAPER.

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

## **I. RESOURCES AVAILABLE WITHIN THE JURISDICTION**

### **A. Community Development Block Grant (CDBG) (Fund 270)**

The City of Monterey currently receives funds directly from HUD as an entitlement community. The charts below identify CDBG revenues and expenditures for FY 2013/2014. These funds include income generated by the land lease for the Hotel Pacific, which was substantially reduced this year due to the economic downturn and reduced tourism. Staff has been working on compliance issues regarding the housing rehabilitation program loans and generated the repayment of a number of outstanding loans.

Entitlement Grant	Unexpended 2013/14 Entitlement	Program Income	Carry over PI from 2012/2013	Expenditures 2013/14	Carry Forward to 2013/2014
\$181,774	\$175,181	\$1,311,135	386,635	\$782,251	\$528,613

### **B. Successor Housing Agency (RDA-Housing Trust) (Fund 268)**

Prior to February 1, 2012, the City of Monterey received funds from three (3) active redevelopment projects: Cannery Row; Greater Downtown; and Custom House. On February 1, 2012 all redevelopment agencies in the State of California were dissolved pursuant to Redevelopment Dissolution Act ABx1 26. In compliance with ABx1 26 the City of Monterey elected to become Successor Agency to the Redevelopment Agency (RDA) and Successor Housing Agency (SHA). Since February 1, 2012 Housing and Property Management staff, as well as Finance Department staff have worked together to implement ABx1 26 and complete allowed transfers of former Redevelopment Agency housing assets to the City of Monterey as Successor Housing Agency. Housing transfers, including loan and affordable housing property assets have been completed. The proceeds from the sale of these housing assets and/or loan payments are SHA program income and the source of funds for future Low and Moderate-Income Housing programs (LMIH programs). Additionally, \$6,822.00 was spent towards completing the 18 affordable low and moderate-income apartments at Monterey Hotel from a total of \$1,783,493 in funds obligated to complete the project and transferred to the SHA.

A remainder of \$1,745,649 in Housing Trust Funds is now available to complete the affordable apartments at the Monterey Hotel. A decision was made by the City Council on September 3, 2013 that the City would pursue ownership of the apartments and complete their construction with the remainder funds. The affordable LMIH apartment units are expected to be completed in 2014.

On September 10, 2013 the Successor Agency (SA) received State of California Department of Finance (DOF) finding of completion (Finding of Completion) for the wind down of the former RDA. On October 23, 2013 the DOF approved transfer of four former Redevelopment Agency properties to the City of Monterey as governmental purpose properties. This transfer and the finding of completion mean that the SA's only remaining tasks are oversight of the release of SHA funding of

the Monterey Hotel and completion the SA Long Range Property Management Plan (LRPMP). The LRPMP has been submitted to DOF and it is currently under review for approval. The only property included in the LRPMP is the Hotel Pacific at 300 Pacific Street. Upon approval of the LRPMP the Hotel Pacific land lease will be transferred from the SA to the City of Monterey. All rental revenue from the Hotel Pacific is used as CDBG program income and only used to fund CDBG eligible housing and community development activities.

### **C. HOME Investment Partnerships (HOME)**

The City of Monterey currently funds two (2) program activities with HOME funds:

- Casa de la Estrella Apartments Project Operating Reserve; and,
- Recaptured funds from an approved Short Sale partial HOME down payment assistance loan pay back.

In Program Year 2013 no down payment assistance was provided. In the Program Year City staff's effort with regard to its first-time homebuyer program was focused on the sale of 6 City owned deed restricted condominium units. Four of the units had been purchased with CDBG funds. The remaining two units had been purchased with former Redevelopment Agency funds (now SHA funds). Five of these units were successfully sold in the Program Year. The four units CDBG funded were sold. Their sale completed the national objective and generated new program income. One of the SHA units was sold and its sale generated new SHA program income. At the end of the Program Year the second SHA unit was in escrow. Additionally, at the end of the Program Year, staff initiated an opportunity purchase of a Low-Income deed restricted unit at 820 Casanova Street. This unit will be purchased with CDBG program income in Program Year 2014 (FY 2014-13).

The chart below refers to HOME revenues and expenditures for the Casa de la Estrella Apartments for FY 2013-14.

<b>HOME Grant Funds-State</b>	<b>FY 2012/13 Carry Over</b>	<b>FY 2013/14 Received</b>	<b>FY 2013/14 Total Expenses</b>	<b>Carried over to 2014-15</b>	<b>Total 2014/15 Funds</b>
<b>TOTAL</b>	<b>\$81,676.00</b>	<b>\$34,862.31</b>	<b>\$6,307.05</b>	<b>\$42,301.69</b>	<b>\$152,632</b>

## **II. LEVERAGING RESOURCES**

### **A. Community Development Block Grant (CDBG) – Major Expenditures**

#### **1. Administration:**

\$150,718.00 was expended to support program administration and planning activities, including costs related to personnel salaries, benefits, program supplies and training.

#### **2. Community Services Grants:**

CDBG-funded community services grants totaling \$71,500.00 were awarded to eight (8) non-profit agencies for thirteen (9) separate activities in FY 2013/14. Together the funded agencies assisted a total of 1572 low-income individuals. The services provided with the assistance of these funds included counseling, meal delivery for seniors, senior advocacy and legal aid, supportive housing

for disabled individuals, mental health education and overnight shelter for individuals experiencing homelessness.

Highlights of Community Service Grants Outcomes for Monterey citizens include:

- **Alliance on Aging.** Assisted 223 Monterey seniors with tax returns (78% of the assisted clients live in the extremely low to low income range based on 2013 federal poverty guidelines).
- **Alliance on Aging.** Ombudsman program conducted 1658 facility visits to assist Monterey seniors residing in long term care facilities within the City of Monterey.
- **Community Human Services.** Provided outreach, counseling, assistance, meals, family reunification and housing services to 264 runaway and homeless youth in the City of Monterey.
- **The Food Bank of Monterey County's Emergency Food Assistance Program.** Distributed 1,308.00 bags and boxes of food to 305 very low and low-income City of Monterey residents. This assistance includes distribution of supplemental food bags and boxes facilitated by the Carmel Valley Rotary Club at two housing complexes for low income seniors and disabled (Casanova Plaza and Portola Vista) in the City of Monterey.
- **Legal Services for Seniors.** Assisted 258 seniors (98.1% low and very low income living on fixed incomes) received free legal services by licensed attorneys and competent legal advocates of Legal Services for Seniors. This number of assisted seniors represents a 7% increase over the services provided in the previous year. The types of cases included: consumer issues, probate guardianship/family, housing, Medicare/ Medical/ other health, Social Security/SSI/Other income. Additionally, the City of Monterey Housing and Property Management office is referring fair housing related complaints affecting seniors to Legal Services for Seniors.
- **Meals on Wheels.** Delivered 2.5 meals per day, five days a week to 102 homebound low income, frail elderly and disabled adults who could neither shop or cook for themselves and who had no adult caregiver regularly in the home.
- **INTERIM, Inc.** Assisted 98 individuals experiencing homelessness and psychiatric disabilities were assisted by Interim, Inc. through its McHome program. Services included street outreach and supportive housing.
- **The Salvation Army Corps.** Provided emergency rental assistance to 42 low income households. This number represents a 40% increase in the number of assisted persons from last year (30 individuals).
- **Shelter Outreach Plus' I-HELP Program.** Served 191 individual homeless single Monterey men with food and emergency shelter, 39 of these individuals participated in employment program and 34 have acquired permanent housing.

3. Housing Rehabilitation Program

Expenditures for Major Housing Rehabilitation Loans, Emergency Loans, Mr. Fix It and Home Safety Grants, and Housing Accessibility Grants totaled \$210,000.00. A total of 2 Major Rehabilitation loans projects and 23 grant projects were completed in FY 2013/14. These included loans for new roof and gutter repairs, driveway and walkway repairs and a new roof, installation of solar tubing, and repair of an exterior wall due to water intrusion, ten (10) Mr. Fix-It Grants; seven (7) Home Safety Grants; and six (6) Housing Accessibility Grants. All of these funds were awarded to low-income homeowners. Recipients of housing rehabilitation program assistance were primarily senior citizens, and some participants received more than one type of program grant assistance.

4. Down Payment Assistance Program

This fiscal year no low-income CDBG down payment assistance loans were provided. However, 5 deed restricted affordable condominium unit transactions were completed in Program Year 2013 at 565 English Avenue. Each of these units is restricted to Low-Income first time homebuyer. These transactions were completed without the need for down payment assistance.

5. Code Enforcement

The Code Compliance Coordinator (Coordinator) is funded .5 FTE by CDBG funds investigated 67 code enforcement cases to reduce deteriorating property conditions in the low income areas of the City contained within Tract 133. The Coordinator addresses blighting conditions such as neglected foreclosures, hoarding conditions, inoperable vehicles stored in yards, and health and safety concerns.

The Coordinator works in conjunction with the North Fremont Street Business Association, CONA neighborhood and adjacent Low-Income residential neighborhoods (43.4% Low-Income Census Block Groups) to identify potential code compliance matters. When appropriate, the Coordinator refers households to City housing programs and community service organizations. As necessary the Coordinator will collaborate with non-profit community service organizations such as Legal Services for Seniors, and the Mandell Gisnet Center for Conflict Management at Monterey College of Law.

6. CONA Targeted Area

In addition to focused code enforcement, \$67,000 in CDBG funds were used to improve the accessibility of sidewalks in the neighborhood as a means of improving pedestrian movement between the residential neighborhood and adjacent. Additionally, \$4,124 in CDBG funds were expended for clean-up effort and outreach in the CONA neighborhood. The Housing and Property Management Office staff continues to make a concerted effort to provide notice of the City's housing rehabilitation programs to the CONA residents.

7. Van Buren Housing Project Progress

The currently vacant land and three older homes were purchased for the purpose of construction of an affordable housing project. The City plans to develop up to 19 units of affordable LMIH rental units for seniors on this land. The City Council approved deed restrictions which have been recorded on these parcels. The timeline for production is estimated to be 2 to 3 years depending on the selection of a developer and financing.

This Program Year the City prepared and published a Request for Qualifications (RFQ) soliciting proposals from developers to enter into exclusive negotiations to develop the senior housing project on Van Buren Street. On September 16, 2014 the City Council reviewed the response to the RFQ and selected MidPen Housing as the developer for negotiation of an Exclusive

Negotiating Agreement (ENA). The ENA is intended to result in a Disposition and Development Agreement (DDA). The City also as required by HUD established a Payment Bond Certificate in the amount of \$1,343,209 as security for reimbursement of CDBG funds in the event the Van Buren Project does not proceed. Entitlement reviews for the Van Buren Project, including use permit, hazardous materials assessment and environmental determination, are anticipated to begin once the developer is selected and a Disposition and Development Agreement is negotiated. Entitlement review is scheduled to be completed prior to the end of FY 2014/15.

## **B. Former Redevelopment Agency Housing Set Aside-Expenditures**

### **1. Administration**

In FY 2013/14, \$193,806.37 in Housing Trust funds [former Redevelopment Agency housing funds that were transferred to the City as Successor Housing Agency (the "City")] were expended to support program administration and planning activities. These administrative costs included costs related to personnel salaries and benefits, program supplies and professional contract services.

### **2. New Affordable Rental Projects**

During FY 2013/14, the City continued to participate in the completion of the Monterey Hotel LMIH apartment project. City staff provided technical assistance to the project Receiver and continued to explore alternatives for completing the LMIH units. The City has successfully worked with the DOF to confirm that Housing Trust funds are properly obligated to the Monterey Hotel and available to fund completion in the event the City completes the project without other assistance. Staff continues to examine all alternatives with the intent to ensure that one hundred percent of the 18 units are maintained as LMIH. These alternatives include a land lease with a non-profit developer for management of the affordable units.

### **3. Down Payment Assistance Program**

In FY 2013/14 Housing Trust funds were not available to provide down payment assistance. At the beginning of FY 2013/14, the transfer of Housing Trust Funds to the City was subject to DOF's "meet and confer" process and the outcome was unknown. Although funds were programmed for down payment assistance, these funds were not expended as the City worked through the DOF meet and confer procedure and focused on other aspects of the First-time Homebuyer Program. City staff continues to work with lenders to gain lender approval of the City's various LMIH ownership program documents and develop appropriate guidelines for use of down payment assistance when City owned affordable units are marketed for sale.

### C. HOME Investment Partnerships (HOME) – Major Expenditures

#### Casa de la Estrella Apartments Replacement Reserves

The Casa de la Estrella Apartment's project site is composed of eight (8) very low and low-income affordable rental housing units. This project site was purchased and rehabilitated with HOME grant funds in 1994. Accumulated rents of \$36,553.33 in FY 2013/14 continue to fund an operational and replacement reserve for items that have reached the end of their useful life. In FY 2013/14, improvements were made to gates and a state-of-the-art security camera system throughout the apartment complex to deal with ongoing issues of graffiti and vandalism.

## III. SUMMARY OF OVERALL PROGRESS

### A. Assessment of Strategic Plan, Goals, and Objectives

The unique characteristics of the Monterey Peninsula housing market influence the City of Monterey's funding priorities and implementation of programs. While ownership prices have declined, market rate housing is still not within the reach of many first time home buyers. In the present economic and banking environment renters and homeowners face various barriers in their search for viable housing options as indicated below:

#### 1 High Rental Costs

HUD data indicates as:

UNIT SIZE	AVERAGE RENT JULY 2014
Studio	\$970
1 BED	\$1,100
2 BED	\$1,380

[Low vacancy rates compound the rental housing issue. The historic vacancy rate in Monterey ranges between 0.5% and 1.5%. Little construction of new rental units in the region has increased the demand for a limited supply of units, and rents remain high and often unaffordable to extremely low, very low and low income households.]

The Housing Authority of the County of Monterey and HUD established the latest Countywide Fair Market Rents schedule on October 1, 2013. However, the Payment Standard schedule for Section 8 vouchers is different. The Housing Authority lower payment standard makes it difficult for Section 8 voucher holders to acquire rental housing in the City, and landlords are reluctant to reduce rents to this level. Additionally, the Housing Authority has closed its Section 8 housing assistance voucher program to new enrollees due to the length of the current waiting list. Typically, the Monterey Peninsula has been given a 110% payment standard. The Housing Authority rent schedule is as follows:

Type of Rents	Studio	1 bedroom	2 bedroom	3 bedroom
Countywide Fair Market Rents	\$919	\$1,034	\$1,187	\$1,677
Payment Standard (Salinas, So.Co., No.Co., unincorporated)	\$875	\$983	\$1,128	\$1,594
Payment Standard (Monterey, Carmel, Carmel				

Valley, Pacific Grove, Seaside, Marina)	\$892	\$1,003	\$1,152	\$1,627
---	-------	---------	---------	---------

## 2 High Purchase Prices

The Monterey County Association of Realtors compiles data from the Multiple Listing Service about sales. The following data from 2009 to June 2012 shows that the average sales price for single family detached homes dropped while in 2011 the prices began to increase and these price increases continue. For units in common interest developments (condominiums), the average sales price also continued to increase. A detail of MCAR's data is as follows:

	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>Jan-June 13</u>
<b><u>Single Family</u></b>					
Closed Sales	106	119	150	175	95
Average Days on Market	118	104	129	87	67
Average Sales Price	\$578,438	\$605,743	\$522,079	\$532,382	\$576,131
Median Sales Price	\$520,000	\$550,000	\$463,000	\$490,000	\$557,000
<b><u>Common Interest Dev.</u></b>					
Closed Sales	42	64	68	87	42
Average Days on Market	45	119	114	82	62
Average Sales Price	\$395,405	\$298,558	\$273,042	\$270,812	\$303,552
Median Sales Price	\$373,000	\$237,450	\$204,500	\$225,000	\$227,450

The City's ownership programs have been a means to offset these prices and to affirmatively further fair housing to those that live or work in the City. This has been especially challenging these past few years, due to tightened lending practices and the lack of well paying jobs available.

## 3 Lead Based Paint Assessment

According to the adopted City of Monterey Housing Element, there are an estimated 3,024 housing units located within City limits, many of which are in need of some level of rehabilitation. In addition, approximately fifty (50) percent (or 1,512) of all single family housing units within the City of Monterey were built prior to 1978 and are subject to the City's Lead-Based Paint Program Plan. This Plan specifies that any unit, which is rehabilitated with City assistance, must undergo a visual inspection, and if lead based paint is suspected the project site is then formally tested. Test findings are incorporated into the housing rehabilitation activities, which must be conducted by a certified contractor, including appropriate disposal of any lead-based paint, appropriate work practices, and remediation efforts.

## 4 Additional Barriers

Other characteristics of the local housing market that restrict the housing options for low and moderate-income families include:

- Lack of available water to support new construction.
- Absence of personal savings for a down payment and closing costs.
- High land costs that limit new development.
- All new development must be targeted to redevelopment of existing sites.

- Final construction financing is difficult to obtain in the current banking environment.

#### 5 Coordination with the Housing Authority, Public Housing Initiatives, and Non-Profit Housing Developers

There are currently 176 units of publicly owned affordable housing units located within the City of Monterey.) Thirteen (13) of these units are owned by the City of Monterey and the remainder are owned by the Housing Authority of the County of Monterey (HACM) or an affiliate. Additionally, there are 216 affordable rental units owned by non-profit affordable housing developers or private owners. The public housing sites in the City are relatively free of problems, and if criminal issues arise the City Police Department coordinates with the property owners or managers to address the issues. No public housing units in the City are proposed for demolition or disposition.

The two largest HACM or HACM affiliate projects contain a total of 150 LMIH located in the City of Monterey. Portola Vista at 20 Del Monte Avenue contains 64 units for elderly and handicapped individuals. An affiliate HACM non-profit entity Monterey County Housing Inc. (MCHI), owns the second largest project. This site is known as Casanova Plaza and it contains 86 units for seniors and handicapped individuals. The address is 800 Casanova Avenue and it is located in the Casanova Oak Knoll Neighborhood (Census Tract 133)

HACM manages 204 Section 8 Housing Choice Vouchers for residents of the City of Monterey. Many of the vouchers are used at Casanova Plaza, which is the Housing Authority's other housing project for seniors and the disabled in the City of Monterey. Currently, there are no project based Section 8 sites in the City of Monterey.

The HACM waiting list has 7311 households on the waiting list for Section 8 Housing Choice Vouchers with 81% extremely low income and 76% of the total consisting of households with children. The waiting list for new Section 8 Housing Choice Vouchers is currently closed. HACM has also closed the Portola Vista waiting list for new applicants, though there have been opportunities for new senior and/or disabled residents at Casanova Plaza.

CHISPITA Inc., an affiliate of the non-profit, Community Housing Improvement Systems and Planning Association, Inc. ("CHISPA"), operates another rather large senior housing site in the City of Monterey. The project, El Estero Senior Housing is located near the downtown at 151 Park Avenue. This project was developed on land owned by the City and ground leased to the non-profit as developer and operator. The site contains twenty-six (26) units affordable to very-low-income seniors. The ground lease expires September 21, 2058. As with all other affordable rental properties the CHISPITA project is subject to a waiting list.

Additional assistance is provided to low income renters by the City's Housing and Property Office. The office serves as an information and referral center. The City often receives citizen requests for information on affordable rentals and responds by providing a list of affordable rental units and referrals to property owners and property managers. Referrals are also provided to HACM and CHISPITA for housing opportunities and The Salvation Army for rental assistance. City staff provides advocacy and guidance to low-income individuals and families regarding affordable housing assistance and eligibility criteria and assists with application forms and processes.

## **B. Consolidated Plan Priorities**

Based upon the Five-Year Consolidated Plan, the City of Monterey has identified five (5) priority groups, which directly impact the development and implementation of HCD programs. Each of these program priorities are designed to address and alleviate local poverty based on the targeted income and population. The City of Monterey currently administers four (4) programs that directly serve the populations indicated below:

- 1) First-Time Homebuyers - Low-Income and Moderate-Income Households
- 2) Very Low-Income and Low-Income Homeowner Households
- 3) Homeless Persons and Persons At Risk of Homelessness
- 4) Very Low-Income and Low-Income Non-Homeless Special Needs Households
- 5) Very Low-Income and Low-Income Renter Households

### Purchase and Resale Inclusionary Housing Program

The City of Monterey promotes first-time homeownership through the sale and resale of deed-restricted affordable ownership housing units in the Affordable Ownership-Purchase and Resale Inclusionary Housing Program inventory. Currently, the program inventory consists of previously developed project sites or approved and recorded condominium conversion subdivisions. In FY Program Year 2012, the developer of the condominium project at 820 Casanova Avenue in the CONA Neighborhood Improvement District completed the sale of 20 deed restricted below market rate units which added to the inventory of potential future purchase and resale units. In Program Year 2013, the City completed the sale of six (6) ownership units at 565 English Avenue. Each of these units is restricted to remain permanently affordable as LOW-INCOME units.

### Major and Minor Housing Rehabilitation Program

Low-income households may also apply for a variety of housing rehabilitation and home repair loan and grant programs. These loans and grants are restricted to low income seniors and handicapped residents who own and occupy single-family homes within City limits. Outreach includes staff presentations to service groups and agencies that serve the elderly and works extensively with the CONA area to assist homeowners. Additionally, the Code Enforcement program refers households in need of rehabilitation assistance to the City's Housing Rehabilitation programs.

### Community Services Grant Program

The City of Monterey distributes funds to non-profit organizations providing community services or housing services to low and moderate-income Monterey residents through its annual community services grant funding process. Each year, non-profit organizations can apply for Community Development Block Grant (CDBG) funds. In past years, the City had supplemented these grants with Redevelopment Agency Housing Trust Funds for programs and activities that were directly related to the provision of affordable housing. The dissolution of redevelopment agencies statewide eliminated this supplemental funding source and in FY 2013-14 community services were only funded with CDBG grants, and unfortunately, the funds for this program are limited due to the fact that former redevelopment housing funds are no longer available.

## **C. Summary of Goals Addressing Consolidated Plan Priorities**

Priority Group 1: First-Time Homebuyers - Low-Income and Moderate-Income Households

- Assessment

Prospective homebuyers in the City of Monterey have traditionally faced assorted obstacles in their quest for homeownership including high purchase prices, absence of personal assets and savings sufficient to support a down payment. This has been amplified by the current strict requirements to qualify for conventional loan financing.

In Program Year 2013 the City completed the sale of 5 City owned deed restricted Low-Income condominium units to first time homebuyers. These units were priced to be affordable to eligible Low-Income households without need for down payment assistance.

- Promote homeownership through the sale and resale of deed-restricted affordable ownership housing units, through the Purchase and Resale Inclusionary Housing Program.

In Program Year 2013 staff was successful in selling 5 units. The strategy followed in selling these units will be carried forward into Program Year 2014. The City anticipates pricing City owned units to be affordable to first time Low-Income homebuyers without need for down payment assistance.

In FY 2010-11 and FY 2011-12 the City completed the purchase of 3 additional affordable housing units. These units are a 3-bedroom single family dwelling at 595 English Avenue, a 2-bedroom condominium unit at 20 Yerba Buena and a 1-bedroom condominium unit at 300 Glenwood Circle. Each of these units was purchased with Successor Agency funds and was successfully transferred to the City of Monterey as SHA. Repair of 595 English Avenue has been initiated and each of these SHA units will be sold in Program Year 2014

Priority Group 2: Very Low-Income and Low-Income Homeowner Households

- Continue to assist low-income homeowners through housing rehabilitation loans and grants.

Two (2) Major Rehabilitation loans were completed in Program Year 2013. The City also completed ten (10) Mr. Fix It grants, seven (7) Home Safety and Accessibility grants and six (6) Housing Accessibility Grants. These loans and grants were funded with CDBG money and they were provided to assist elderly and disabled owner residents complete needed repairs and improve habitability of their homes. These programs assist elderly and disabled owners to remain in their home.

Priority Group 3: Homeless Persons and Persons at Risk of Homelessness

- Assessment

According to a 2013 Monterey County Homeless Census & Survey, the City of Monterey was home to a total of 542 homeless. This reflects an increase of 102 persons above the number in 2011. This is 23% increase. As a result the City of Monterey continues to place a priority on funding community service organizations that provide programs directly addressing homeless populations.

- Continue to target funds and staff resources toward homeless prevention and intervention programs

In Program Year 2013, a total of 557 persons received service from various CDBG community services grant funded agencies that target services to those individuals experiencing homelessness. Agencies providing these types of targeted services are Community Human Services, Shelter Outreach Plus, Interim, Inc. and Salvation Army.

Priority Group 4: Very Low-Income & Low-Income Non-Homeless Special Needs Households.

- Assessment

The City of Monterey distributes funds to non-profit organizations providing community services to low and moderate-income Monterey residents through its annual community services grant funding process. Each year, non-profit organizations can apply for Community Development Block Grant (CDBG) funds. Approved grant recipient agencies also receive referrals for service from the City in addition to their traditional outreach efforts.

In Fiscal Year 2013-14 the Neighborhood Revitalization Program was submitted and approved by HUD. A Code Enforcement Officer was hired to work with the neighborhoods that contain Census Tract Block Group concentrations of 43% (exception community) or more low-income households. The City's Census Tract 133 contains block groups that exceed the 43% low-income threshold in the CONA neighborhoods. Brochures, program information and applications for the Housing & Property Management Division's home repair grants and loan programs were distributed.

The Code Enforcement Officer worked with the existing neighborhood and business associations to address code enforcement issues, address blighted properties, provide outreach to low income households in need of home repair grants, and clean up in regards to health and safety issues.

The Code Enforcement program investigated 67 cases in the designated low income neighborhoods, along with the CONA area, addressing blight and proactively identified code enforcement issues. 67 cases were resolved.

- Continue to support the provision of community services through grant funds and technical assistance.

CDBG-funded community services grants totaling \$71,500.0 were awarded to eight (8) non-profit agencies for thirteen (9) separate activities in Program Year 2013. Together the funded agencies assisted a total of 1913 low-income individuals. The services provided with the assistance of these funds included counseling, meal delivery for seniors, senior advocacy and legal aid, supportive housing for disabled individuals, mental health education and overnight shelter for individuals experiencing homelessness. The CDBG funding was leveraged with \$37,157 in SHA funds to provide additional assistance to these community service organizations.

Priority Group 5: Very Low-Income and Low-Income Renter Households

- Assessment

The Housing Element indicates that over sixty-five percent (65%) of City housing units are rentals. Prospective renters in the City of Monterey face significant obstacles in their quest for rental properties including high rental costs, decreased availability of rental units due to low vacancy rates in the area and limited new construction of rental units. The City's goal is to increase affordable rental production opportunities through completion of the apartments at Monterey Hotel

and partnership with non-profit affordable housing developers to develop the Van Buren Senior Housing project. Additionally, the City-owned Casa de la Estrella Apartment's site, which contains eight (8) affordable (low income) rental units, continues to be reserved for very low and low income households.

- Continue to support the retention and development of affordable rental housing.

City staff was successful in gaining DOF confirmation of affordable housing transfers to the City of Monterey. As a result the City will continue to pursue completion of the Monterey Hotel apartments as affordable housing units. Staff continued to monitor property management of the Casa de la Estrella Apartments.

- Promote resolution of landlord/tenant disputes thereby reducing evictions.

Continued to utilize and monitor the Voluntary Rental Guidelines Program, which addresses the issue of unreasonable rent increases, as well as landlord/tenant disputes. Provided referrals to Alliance on Aging, Legal Services for Seniors, and The Salvation Army for persons/households at-risk of eviction, foreclosure or financial abuse.

- Retain and seek out additional rental assistance funds for low-income and special needs households.

Provided referrals to City-funded agencies including the Housing Resource Center, Interim, Inc., and Salvation Army for rental assistance subsidies.

#### **D. Performance Measurement**

In accordance with HUD's performance measurement directive, the City has incorporated the required measurement systems within the existing program evaluation processes. The City has incorporated the measurement criteria into all community services invoicing and report forms.

In accordance with the HUD performance measurement initiative, the chart below indicates the program title and beneficiary data, which correlates with particular HUD outcome and objective categories for CDBG-funded activities.

##### **1. Impediments to Fair Housing Progress**

The City made progress in addressing the Analysis of Impediments to Fair Housing findings. Overall many of the identified impediments involve the actions of the HACM which administers the County's Section 8 Housing Assistance Voucher program. The agency also has issues relating to full funding of the Section 8 voucher program which makes marketing of the program more difficult on the Monterey Peninsula as full rents are not being allowed. This causes some concern to the local communities, and impacts the agency's ability to de-concentrate poverty level households, pursuant to HUD regulatory requirements.

**CDBG FUNDS**

Indicator	Outcome- Availability and accessibility	Outcome- Affordability	Outcome- Sustainability
Suitable Living Environment	Community Services Grants 1918 low-income individuals	557 homeless were assisted with shelter or youth/family reunification	Neighborhood Revitalization - outreach and 67 code enforcement investigations - tract 133 – 67 code enforcement violations resolved
Decent Housing	2 Major Rehabilitation loans 23 Housing Rehabilitation – grants including; 10 Mr. Fix it grants, 7 Home Safety grants and 6 Housing Accessibility grants	Completed sale of 5 City owned deed restricted affordable housing units at 565 English Avenue	

**HOUSING OUTCOMES**

(Persons Assisted with Housing Leveraged With CDBG, HOME and SHA Funds)

<i>Outcome</i>	<i>Indicator</i>	<i>Program</i>	<i>Number Assisted</i>
Decent Housing	Affordability	Down Payment Assistance	0
Decent Housing	Availability/Accessibility	Acquisition/ Rehabilitation/Resale to Low-Income Household	CDBG-4 Low-Income households; SHA-1 Low- Income household (multi-year)
Suitable Living Environment	Sustainability	Code Enforcement- Rehabilitation and CONA Activity	CDBG-67 low-income area targeted neighborhood health and safety clean-ups 67 code enforcement cases investigated in low income areas
Decent Housing	Availability/Accessibility	Domestic Violence Shelter	CDBG 0 women and children. However, the City Council provided \$11,550 in non CDBG funds to fund YWCA Domestic Violence Shelter in Program Year 2013
Suitable Living Environment	Sustainability	Homeless Youth Street Outreach and services	CDBG- 264 very low and low- income youth
Suitable Living Environment	Affordability	New Rental Construction	Projected RDA-18 units in the Monterey Hotel (3-Very Low, 9-Low and 6-Median Income units. Rental prices are projected to be in the range of \$525-\$1,145, depending on unit size.)

Decent Housing	Availability/Accessibility	Minor Rehabilitation	CDBG-10 low-income grants for seniors and disabled individuals
Decent Housing	Availability/Accessibility	Accessibility Program	CDBG- 7disabled low-income
Decent Housing	Affordability	Acquisition Rehabilitation	CDBG- 0 units acquired and rehabilitated in Program Year 2013. Two to 4 units anticipated to be acquired in Program Year 2014.
Suitable Living Environment	Sustainability	Fair Housing Counseling, eviction prevention and Mediation	None quantifiable

#### **E. Affirmatively furthering Fair Housing & Equal Opportunity**

The City of Monterey has an adopted policy to "insure that all persons in Monterey receive equal housing opportunities" regardless of age, gender, family size, race, creed, color, or national origin.

In FY 2009-10, the City of Monterey adopted a new Five-Year Consolidated Plan. Policies and Programs designed to address any findings in the Analysis of Impediments to Fair Housing conducted concurrently with the Consolidated Plan in 2004. Beginning in FY 2005-06, the City of Monterey took action on the recommendations set forth in the Analysis, and maintained a contract with the Conflict Resolution and Mediation Center (CRMC). Though CRMC is no longer available to provide mediation services, the City of Monterey has referred fair housing complaints to other local organizations that provide conflict resolution and mediation services. Today, the City of Monterey refers citizens in need of intervention on housing issues to City-funded local advocacy and legal aid agencies, including the Mandell Gisnet Center for Conflict Management at Monterey College of Law, Legal Services for Seniors, and Alliance on Aging as well as other agencies at the local, regional, state, and federal levels as appropriate. These referrals link the City's low-income, senior, minority, disabled, large households, and other special needs individuals and groups with needed services to assist them remain housed, obtain housing, or intercede in abusive situations.

In order to broaden fair housing choices, the City also serves as a distribution center for public housing, Section 8, and HOME Tenant-Based Rental Assistance (TBRA) applications when applications are still being accepted. City staff provides advocacy and guidance to low-income households regarding available housing assistance, and eligibility criteria, as well as application forms and processes.

The City of Monterey Housing and Property Management office serves as a center for referral of homeless individuals to the Housing Resource Center's Rapid Re-housing case management and rental assistance collaboration, Interim Inc. and Salvation Army. The Housing and Property Management Office also maintains an inventory of LMIH rentals in the City and provides this referral list to citizens who call or come into the office in search of affordable housing.

The City of Monterey also maintains the Voluntary Rental Guidelines Program, which addresses the issue of unreasonable rent increases as well as landlord/tenant disputes and refers them to the Mandell Gisnet Center for Conflict Management at Monterey College of Law.

Community services grant fund recipients are also educated on the significance of providing services in accordance with Fair Housing and Equal Opportunity Requirements. Appropriate beneficiary data collection and reporting requirements pertaining to various demographic characteristics (i.e. race/ethnicity, income, other special needs criteria, etc.). All funded agencies are monitored to ensure that outreach to various populations occurs, and the language and cultural needs of the specific client populations are being adequately met by agency personnel. Additionally all recipient agencies are monitored annually to determine if programs are accessible to those who may be disabled.

The Legal Services for Seniors program provide services to those over 62 years of age and the disable and receives CDBG funds to provide education to seniors on fraud, housing related matters, including reverse mortgages, and assistance with disputes with landlords regarding reasonable accommodations.

The City of Monterey also conducts extensive outreach for its housing and community development programs via newspaper ads, postal mailings, email messages, in-office brochure and flyer distribution, notification to neighborhood associations, internal and external City newsletters, and informal/formal presentations at local meetings. The City of Monterey website is also a valuable resource due to its inclusion of linkages to external housing and community development programs and social services.

Public notices of public hearings (which are conducted up to four (4) times per fiscal year) are posted in the local newspaper in both English and Spanish. Several program brochures and application forms are readily accessible in both English and Spanish.

Collaborative efforts with private, public, and non-profit entities also serve to address local housing issues as indicated below:

- Implemented the Census Tract 133 (CONA) Neighborhood Revitalization Strategy Plan.
- Addressed findings for year 2 (Exhibit C) that were identified in the 2005-2010 Analysis of Impediments to Fair Housing.

## **F. Continuum of Care**

The City of Monterey has provided extensive funding toward the efforts to establish the local Continuum of Care homeless service delivery system for its homeless citizens. According to the 2013 Monterey County Homeless Census and Survey, the Monterey City of Monterey was populated by 542 homeless persons and this was a 23% increase from 2011.

In FY 2013-14, the City of Monterey priorities with regards to homeless services and prevention were to address service gaps identified in the local ten-year Homeless Services Plan through continued provision of community services grant fund allocations to the agencies listed in the chart below. In FY 2013-14, a total of 518 at-risk or homeless individuals were provided with City assistance relating to prevention or intervention in the homelessness cycle.

### **GRANT FUND ALLOCATIONS**

<b>AGENCY NAME AND SERVICES PROVIDED</b>	<b>GRANT TYPE</b>	<b>GRANT AMOUNT</b>	<b>PERSONS SERVED</b>
<b>Alliance on Aging</b> - Senior Tax Assistance and	CDBG/ Successor Agency	\$10,000/5,000	223  1658

Ombudsman.			
<b><u>Community Human Services</u></b> - Provides counseling, advocacy, crisis intervention, and family reunification services and manages an emergency housing site located in the City of Monterey. All programs target runaway or homeless youth	CDBG/ Successor Agency	\$1,000/9,000	264
<b><u>Food Bank of Monterey County</u></b> Food assistance to low-income seniors	CDBG	\$15,000	305
<b><u>Interim, Inc</u></b> - Provides McHome homeless intervention and chronic mentally ill homeless program that provides outreach, intake management and rental assistance.	CDBG/ Successor Agency	\$ 5,000/15,000	98
<b><u>Legal Services for Seniors</u></b> Free legal assistance and representation for seniors	CDBG	\$15,000	258
<b><u>Meals on Wheels</u></b> Home delivery of meals for frail elderly and disabled persons	CDBG/ Successor Agency	\$10,000	430
<b><u>Shelter Outreach Plus</u></b> - Operation of the revolving church emergency shelter for single males (I-HELP)	CDBG/ Successor Agency	\$ 14,000/6,000	195
<b><u>The Salvation Army</u></b> - Provides emergency Rental assistance to prevent eviction/homelessness	CDBG/ Successor Agency	\$10,000/15,000	42

## G. Anti-Poverty Strategy

As a means to reduce poverty, assist individuals to retain or regain housing, and to prevent premature institutionalization of seniors and the disabled, the City provides a number of services as one component of its anti-poverty strategy. Additional programs and services to prevent or reduce poverty include homeownership opportunities, foreclosure counseling and mediation services.

<b>AGENCY NAME AND SERVICES PROVIDED</b>	<b>GRANT AMOUNT EXPENDED</b>	<b>TOTAL PERSONS SERVED</b>	<b>Fair Housing Activity</b>	<b>Anti Poverty</b>
<b><u>Alliance on Aging</u></b> – Tax preparation assistance for seniors Ombudsman	CDBG \$10,000 Successor Agency \$5,000	223 1658	No Yes	Yes
<b><u>Community Human Services</u></b> - Provides counseling, advocacy, crisis intervention, and family reunification services and manages an emergency housing site located in the City of Monterey. All programs target runaway or homeless youth	CDBG \$1,000 Successor Agency \$9,000	264	No	Yes
<b><u>Food Bank for Monterey County</u></b> - Food distribution from this program is intended to supplement household food	CDBG \$15,000	305	In Census Tract 133	Yes

budget for homeless, disabled, seniors and low income households. Site is located in census tract 133.			No	
<b>Interim, Inc.</b> - Provides McHome homeless intervention and chronic mentally ill homeless program that provides outreach, intake management and rental assistance	CDBG \$5,000 Successor Agency \$15,000	98	No	Yes
<b>Legal Services for Seniors</b> - Provides free legal assistance and representation to seniors over 60 years old and disabled individuals	CDBG \$15,000	258	Yes	Yes
<b>Meals on Wheels</b> - Direct food delivery for disabled and frail elderly. Assists population to remain housed and not institutionalized.	CDBG \$10,000	430	No	Yes
<b>Shelter Outreach Plus</b> - Operation of the revolving church emergency shelter for single males (I-HELP)	CDBG \$14,000 Successor Agency \$6,000	195	No	Yes
<b>The Salvation Army</b> - Provides emergency Rental assistance to prevent eviction/homelessness	CDBG \$10,000 Successor Agency \$15,000	42	No	Yes

#### IV. MONITORING & SELF-EVALUATION OF 1-YEAR PERFORMANCE

##### Monitoring and Reporting

The City continuously maintains, monitors and improves performance in existing programs through implementation of approved strategies, goals and priorities, and develops new programs as needs and opportunities are identified. Supportive services agencies were on-site this year.

In accordance with HUD's performance measurement initiative, the City has fully implemented the measurements and outcome reporting required by HUD. All community services invoicing and report forms include the HUD outcomes and objectives. Training has been provided to all funded agencies regarding this system of reporting.

##### Progress on Goals 2013-14

Goal	Activity	Outcome
<b>I. Identify at least one housing project or program in collaboration with other agencies and/or key stakeholders</b>	While City Staff continued to negotiate a land lease for 595 Munras Avenue the project will no longer contain 10 Low-Income affordable rental units. Funding for the low-interest loan was lost with dissolution of former RDA. The funds for a loan are no longer available. This project will go forward as a market rate mixed-use housing project.	Project in the negotiation stage for land lease. Rental units will be market rate and not dedicated low and moderate income units.

<b>II. Leverage previously awarded RDA funds for the Monterey Hotel Affordable Housing project.</b>	City staffs successfully demonstrated to DOF that \$1,783,493 in Housing Trust funds are obligated to complete the Monterey Hotel LMIH apartments. City now owns the unfinished apartment portion of the project. Staff continues to complete strategy for completing the affordable units.	<ol style="list-style-type: none"> <li>1. Completed</li> <li>2. Ongoing</li> </ol>
<b>III. CONA approved as Neighborhood Revitalization Strategy Area</b>	<p>City staff continued to work with CONA neighborhood to develop improvement projects and provide outreach and information on City's low-income home rehabilitation and grant programs.</p> <p>In Program Year 2013 an accessible public facilities infrastructure project was identified as needed and beneficial to the neighborhood.</p>	<ol style="list-style-type: none"> <li>1. Approved by HUD for implementation during 2010-2015 Consolidated Plan.</li> <li>2. Expended \$68,000 in CDBG funds for accessible sidewalk improvement in the 800 Block of Casanova Avenue.</li> </ol>
<b>IV. Apply for additional grants to support new City housing projects as they become ready to implement</b>	City staff continues to research means to gain additional funds to assist development of new housing projects.	Ongoing
<b>V. Secure a Developer and construction plan and timeline for the Van Buren sites previously acquired with CDBG funds</b>	Completed RFQ procurement process for selection of a Developer to develop Senior Housing Project.	<ol style="list-style-type: none"> <li>1. Completed</li> <li>2. Negotiation for DDA will take place in Program Year 2014.</li> </ol>

The City of Monterey views the Program Year 13 as a very challenging one due to the ongoing efforts to complete the dissolution of the Redevelopment Agency and reorganize the housing office to better respond to the loss of housing revenue and elimination of SHA program income for Moderate-Income (up to 120% of Median Income) housing assistance. The loss of former RDA income significantly impacted the City's housing programs. Program Year 2013 represented a transition year as staff adjusted to new funding realities. Additionally, staff has revised its sales strategy for selling City owned affordable housing units without benefit of down payment assistance and inability to price units as affordable to Moderate-Income households. Ownership programs in response to the reality of current real estate market and changes in lender underwriting. Finally, staff has devoted extensive hours to evaluate its current CDBG program and activities to improve efficiency and resolve challenges related to untimely spending of Program Income.

## CAPER CERTIFICATION STATEMENT

### Consistency with Consolidated Plan and N.A.H.A.:

The 2013–2014 Program Year CAPER reports on the City of Monterey's progress in implementing activities and projects (measurable outcomes) reflected in the City's 2013-2014 Annual Action Plan. The 2013-2014 Annual Action Plan activities and projects were consistent with the goals, strategies and priority needs reflected in the City of Monterey's Consolidated Plan, Analysis of Impediments to Fair Housing, and the National Affordable Housing Act (NAHA), as well as promote the Department's overall goals.

Authorized Official  
For City of Monterey

  
By: Michael McCarthy, City Manager

2 / 20 / 2014  
Date



# EXHIBIT C. FAIR HOUSING ACCOMPLISHMENTS, PROGRAM YEAR 2013

HOUSING IMPEDIMENT	FIVE YEAR OBJECTIVE	ENTITY RESPONSIBLE	TIME FRAME	ACHIEVEMENTS
Potential discrimination in lending practices	<ul style="list-style-type: none"> <li>Demonstrate the City's commitment to equal lending by the use and display of the equal housing lender logo</li> <li>Continue to fund the Housing Resource Center (HRC) programs</li> <li>Contract for HRC to advertise programs in Herald in English and Spanish</li> <li>Post on City website information on Reverse Mortgages and links to HUD information on Predatory lenders</li> </ul>	Housing and Property Management	<p>Ongoing</p> <p>Ongoing End of 2011</p>	<p>Completed and ongoing</p> <p>HRC did not apply for funding in Program Year 2013. City continues to refer individuals to HRC for participation in First time Home Buyers classes.</p> <p>Completed</p>
Presence of Lead Based Paint	<ul style="list-style-type: none"> <li>Provide lead based paint warnings on the City's website and list of lead paint abatement contractors</li> <li>Continue to conduct lead-based paint assessments for units being rehabilitated with the City's CDBG funds</li> <li>Provide information regarding lead based paint and lead based paint poisoning on the City's website</li> </ul>	Housing and Property Management	<p>End of 2011</p> <p>Ongoing</p> <p>End of 2011</p>	<p>Completed end of July 2010</p> <p>Ongoing-HUD Regulations</p> <p>Updated April 2012</p>
Housing Choice Voucher Use	<ul style="list-style-type: none"> <li>Work with Housing Authority (HACM) to expand marketing efforts in Monterey to accept Section 8 vouchers. Distribute literature at various locations</li> <li>Collaborate with HACM to maximize the use of Section 8 vouchers and public housing programs for populations at risk of homelessness</li> <li>Encourage the participation of the Family Self Sufficiency (FSS) Program provided by the HACM that live or work in the City to participate in City ownership programs</li> </ul>	Housing and Property Management	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Section 8 voucher list closed, present program is underfunded -reduced rents</p> <p>Provided Certification for Annual Agency Plan.</p> <p>Ongoing communication with FSS coordinator</p>

HOUSING IMPEDIMENT	FIVE YEAR OBJECTIVE	ENTITY RESPONSIBLE	TIME FRAME	ACHIEVEMENTS
High Cost of Housing	<ul style="list-style-type: none"> <li>Continue Incentives for Affordable Housing (AH)</li> </ul>	Housing and Property Management	Ongoing	Worked with HUD to retain Van Buren Street property as potential Low-Income Senior Apartment project. City elected to become Successor Housing Agency (SHA) with intent to use program income to maintain AH and complete Monterey Hotel Apartments
	<ul style="list-style-type: none"> <li>Continue provision of subsidies for production of AH</li> </ul>		Ongoing	
	<ul style="list-style-type: none"> <li>Continue Purchase and Resale Deed Restricted owner program</li> </ul>		Ongoing	Continue to use CDBG funds and SHA program income funds for opportunity purchase of deed restricted ownership units. All units purchased or rehabilitated with these funds are limited to resale to Low-Income households.
	<ul style="list-style-type: none"> <li>Continue Down Payment Assistance Programs from various funding sources for low income households</li> </ul>		Ongoing	With loss of RDA Housing set-aside Down Payment assistance, will focus on low-income households using CDBG, SHA and HOME funds.
	<ul style="list-style-type: none"> <li>Seek to expand the Family Self Sufficiency Section 8 ownership program for participants that live or work in the City</li> </ul>		Ongoing	Inclusionary Ord. now only applies to ownership projects.
	<ul style="list-style-type: none"> <li>Continue to monitor the Inclusionary Ord. for new development, subdivisions, condo. conversions.</li> </ul>		Ongoing	
	<ul style="list-style-type: none"> <li>Work with Monterey County Housing, Inc. (MCHI) to serve near elderly (55+) and seniors that do not have Section 8 vouchers</li> </ul>		Ongoing	
	<ul style="list-style-type: none"> <li>Work with HACM and MCHI to provide a local preference for City residents at 20 Del Monte Avenue, Portola Vista site, and 800 Casanova Senior site consistent with use</li> </ul>		Ongoing	

	permits			
Supply of Affordable Housing for Large Households	<ul style="list-style-type: none"> <li>Encourage HACM to market to owners with rentals of 3+ bedrooms to accept Section 8 vouchers</li> <li>Encourage HACM to apply for a HUD exception for larger 2 and 3bedroom units</li> <li>Under the inclusionary program, encourage developers to build 3+ bedroom units.</li> </ul>	Housing and Property Management	<p>June 2013</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Incomplete. Limited number of 3-bedroom apartments available in community.</p> <p>Incomplete. Inclusionary program only applies to ownership projects. Rental projects are exempt due to Court decision. Market changes have reduced incentive to develop new ownership units. City strategy has shifted to preserving 3-bedroom deed restricted units as a top priority.</p>

HOUSING IMPEDIMENT	FIVE YEAR OBJECTIVE	ENTITY RESPONSIBLE	TIME FRAME	ACHIEVEMENTS
Supply of Affordable Housing for Large Households	<ul style="list-style-type: none"> <li>Implement Program a.1.4 of Housing Element-City will encourage and plan to create development standards for new condominium conversions and ownership townhouses in the R-3 and commercial areas. Require amenities desirable to owners and require larger units (3+ bedrooms) to house families with children</li> </ul>	Planning Office	June 2013	Incomplete. Market changes have reduced incentive to convert apartments.
	<ul style="list-style-type: none"> <li>Encourage condominium conversions to consolidate units to create 3+ bedroom units to accommodate larger households</li> </ul>	Planning & Housing and Property Management	Ongoing	Incomplete. Market changes have reduced incentive to convert apartments.
	<ul style="list-style-type: none"> <li>Require a portion of 3+ bedroom units created in condo. conversions to sell to inclusionary purchasers</li> </ul>	Housing and Property Management	Ongoing	Incomplete. Market changes have reduced incentive to convert apartments.
High Cost of Development of Affordable Housing	<p>Housing Element Programs</p> <ul style="list-style-type: none"> <li>f.1.6. Provide reasonable accommodation to applicants with disabilities by appointing a staff person to streamline permit review process as necessary.</li> <li>f.1.7. Amend zoning ordinance to allow emergency shelters as permitted use in the C-1, C-2 and/or C-3 corridors.</li> <li>f.1.9. Provide zoning flexibility to accommodate SRO housing, near services and transit. Define development standards for SROs.</li> </ul>	Planning Office	June 2013	In process

HOUSING IMPEDIMENT	FIVE YEAR OBJECTIVE	ENTITY RESPONSIBLE	TIME FRAME	ACHIEVEMENTS
Lack of Available Homeless Resources	<ul style="list-style-type: none"> <li>Coordinate and collaborate with the Local Continuum of Care through attendance at the Local Homeless Services Allocation Committee.</li> </ul>	Housing and Property Management	Ongoing	Participation in ongoing planning meetings
	<ul style="list-style-type: none"> <li>Continue to support and expand the Rapid Re-Housing Program for the Monterey Peninsula</li> </ul>		2001-2012	Rapid Rehousing funds fully expended in 2012.
	<ul style="list-style-type: none"> <li>Investigate a site an emergency shelter for single women on the Monterey Peninsula</li> </ul>		Ongoing	Also exploring option for vehicle camping program in the area. City providing a portion of funding to establish a pilot program in Program Year 2014.
	<ul style="list-style-type: none"> <li>Investigate a site and program for the new homelessness of the near elderly (55+) and elderly single women in Monterey through the development of a transitional housing program or other programs such as rental assistance for this population</li> </ul>		Ongoing	Also exploring option for vehicle camping program in the area. City providing a portion of funding to establish a pilot program in Program Year 2014.
Fair Housing Practices	<ul style="list-style-type: none"> <li>Provide proactive fair housing education related to fair housing laws through the Conflict Resolution and Mediation Center (CRMC).</li> </ul>	Housing and Property Management	Complete	CRMC disbanded in 2013.
	<ul style="list-style-type: none"> <li>Continue practice of advertising via annual public hearing, print ads in English and Spanish, distribution of hard copies in various locations, and electronic distribution.</li> </ul>		Ongoing	City provides public notice for housing programs in both English and Spanish
	Require CRMC to present geographic or address data annually to assist the City to monitor and further implement efforts to meet fair housing goals, and determine if specific neighborhoods or apartments are impacted.		Ongoing	City provides referrals to Legal Services for Seniors and Mandell Gisset Center for Conflict Management.

## FY 2013/14 SUMMARY OF CDBG ACTIVITIES AND OUTCOMES

Consolidated Plan Goals	Activity Name	Activity Description	Goals	Output
<b>Housing Activities</b>				
HS-2, SP-3	Van Buren Senior Housing Site	Continue steps to develop the property for senior affordable housing	Select developer and negotiate a Disposition and Development Agreement	Completed RFQ for developer proposals. Gained support from HUD to continue working to develop the property. Established security deposit for possible reimbursement of funds to CDBG Local account.
HS-6, SP-3	Major Rehabilitation Loans	Low-income seniors and disabled households; major rehabilitation	2 loans	2 complete
HS-6	Purchase /Rehabilitation	Purchase of foreclosed units, rehabilitation and sale, or lease option or transitional group home	Sell 6 City owned Low-Income ownership units	Completed sale of 5 units. 4 units had been purchased with CDBG funds. Remaining unit purchased with SHA funds.
HS-6, SP-1, SP-3	Mr. Fix It Grants	Repairs to assist seniors and disabled heads of households remain in their homes	12 grants	10
HS-6, SP-1, SP-3	Home Safety Grants	Repairs to assist seniors and disabled heads of households remain in their homes	12 grants	7
HS-6, SP-1, SP-3	Disabled Accessibility Grants	Assist with accessibility in the home	3 grants	6
HS-3, HS-4	Down Payment Assistance	Leverage existing funds to assist low-income households with down payment assistance	1-3 loans	No loans granted. Sales completed without DPA.
<b>Public Services</b>				
SP-3	Alliance on Aging	Senior employment and tax assistance program	Seniors served	325
SP-1	Community Human Services	Counseling, crisis intervention, and family reunification	Homeless youth assisted	264
SP-1, SP-3	Food Bank of Monterey County	Food assistance to low-income seniors and physically ill	Households Units provided	305 1,308 units

**EXHIBIT D**

Consolidated Plan Goals	Activity Name	Activity Description	Goals	Output
HA-1, HA-2, HA-5, SP-1, SP-4	INTERIM Inc., McHOME	Outreach staff for homeless adults with mental illness	Served homeless with psychiatric disabilities	98
SP-1, SP-3	Legal Services for Seniors	Legal advocacy for seniors, information and referral	Seniors assisted	258
SP-1, SP-3	Meals on Wheels	Home delivery of meals for seniors, frail elderly, and disabled persons	Individuals were served	430
HS-1, HA-1, HA-2, HA-3, HA-4, HA-5	The Salvation Army Monterey Peninsula Corps	Provide emergency rental assistance to prevent eviction/homelessness	Households served	42
SP-4	Shelter Outreach Plus	I-Help program targets homeless single males for employment and housing assistance	Homeless males assisted	191
<b>Casanova Oak Knoll Neighborhood Improvement District</b>				
CD-1, CD-5	Neighborhood Activity	Neighborhood-defined activity; may include façade loan program, and sewer line replacement program	1 activity	Completed
CD-1, CD-4, CD-5	Code Enforcement	Code enforcement in low-income block groups and focus on CONA	code violations cleared	67
<b>Planning and Administration</b>				
PA-1	Planning and Administration	Provide general administration of the CDBG program, including all planning and reporting activities	1 year of program administration	

**CITY OF MONTEREY**

**CAPER FY 2013/14**

**EXHIBIT E**

**FINANCIAL SUMMARY**

**(IDIS # PR26)**



Office of Community Planning and Development  
U.S. Department of Housing and Urban Development  
Integrated Disbursement and Information System  
PR26 - CDBG Financial Summary Report  
Program Year 2013  
MONTEREY , CA

DATE: 09-30-14  
TIME: 16:43  
PAGE: 1

**PART I: SUMMARY OF CDBG RESOURCES**

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	528,613.00
02 ENTITLEMENT GRANT	195,976.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	1,534,324.40
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 RETURNS	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	2,258,913.40

**PART II: SUMMARY OF CDBG EXPENDITURES**

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	880,776.00
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	880,776.00
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	15,175.00
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)	895,951.00
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,362,962.40

**PART III: LOWMOD BENEFIT THIS REPORTING PERIOD**

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	764,692.00
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	764,692.00
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	86.82%

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

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

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

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	60,000.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	11,500.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	8,013.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	63,487.00
32 ENTITLEMENT GRANT	195,976.00
33 PRIOR YEAR PROGRAM INCOME	331,351.26
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	527,327.26
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	12.04%

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

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	15,175.00
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	135,543.00
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)	150,718.00
42 ENTITLEMENT GRANT	195,976.00
43 CURRENT YEAR PROGRAM INCOME	1,534,324.40
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	1,730,300.40
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	8.71%

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

Report returned no data.

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

Report returned no data.

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2011	3	392	5730633	Purchase & rehabilitation rental/ownership	14G	LMH	\$243,902.00
2012	27	447	5723097	Historic Preservation	16B	LMA	\$68,600.00
2013	2	456	5683909	Alliance on Aging	05A	LMC	\$7,500.00
2013	3	457	5683909	Community Human Services	05D	LMC	\$750.00
2013	4	458	5683909	Food Bank	05W	LMC	\$11,250.00
2013	5	459	5683909	INTERIM Inc.	03T	LMC	\$3,750.00
2013	6	460	5683909	Legal Services for Seniors	05A	LMC	\$11,250.00
2013	7	461	5683909	Meals on Wheels	05A	LMC	\$7,500.00
2013	8	462	5683909	Salvation Army	05Q	LMC	\$7,500.00
2013	9	463	5683909	Shelter Outreach - I-HELP	03T	LMC	\$10,500.00
2013	10	464	5685112	Purchase/Rehabilitation - Ownership	14G	LMH	\$50,000.00
2013	11	465	5685112	Major Rehabilitation Loans	14A	LMH	\$120,000.00
2013	12	466	5685112	Mr. Fixit Grants	14A	LMH	\$30,000.00
2013	13	467	5685112	Home Safety Grants	14A	LMH	\$30,000.00
2013	14	468	5685112	Home Accessibility Grants-Disabled Accessibilty	14A	LMH	\$30,000.00
2013	15	469	5685112	Project Delivery-Housing	14H	LMH	\$132,190.00
Total							\$764,692.00

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2013	2	456	5683909	Alliance on Aging	05A	LMC	\$7,500.00
2013	3	457	5683909	Community Human Services	05D	LMC	\$750.00
2013	4	458	5683909	Food Bank	05W	LMC	\$11,250.00
2013	5	459	5683909	INTERIM Inc.	03T	LMC	\$3,750.00
2013	6	460	5683909	Legal Services for Seniors	05A	LMC	\$11,250.00
2013	7	461	5683909	Meals on Wheels	05A	LMC	\$7,500.00
2013	8	462	5683909	Salvation Army	05Q	LMC	\$7,500.00
2013	9	463	5683909	Shelter Outreach - I-HELP	03T	LMC	\$10,500.00
<b>Total</b>							<b>\$60,000.00</b>

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

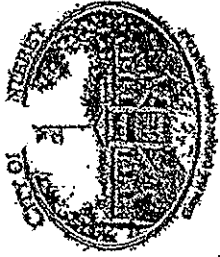
[illegible]

# **CITY OF MONTEREY**

**CAPER FY 2013/14**

## **EXHIBIT F**

**PUBLIC PARTICIPATION:  
PUBLIC HEARING NOTICES  
PUBLIC COMMENTS**



**INVITATION FOR PUBLIC COMMENTS ON  
HOUSING AND COMMUNITY DEVELOPMENT NEEDS  
AND TECHNICAL WORKSHOP ON FY 2013/14  
CDBG GRANT APPLICATION PROCESS**

The City of Monterey seeks public comments on housing and community needs. The comments will contribute to the development of the City's Fiscal Year 2013/14 Annual Action Plan and the Fiscal Year 2013/14 Housing and Community Development (HCD) Program Budget.

These City programs provide affordable housing and other services to low and moderate-income residents of the City of Monterey. The programs are supported with federal, state, and local funds, such as the Community Development Block Grant (CDBG) program of the U.S. Department of Housing and Urban Development.

Comments about needs, and services and programs (current or proposed) to address those needs, may be made at a public meeting on Thursday, January 24, 2013 in the City Council Chambers at 580 Pacific Street at 10:30 a.m. or in writing by January 23, 2013 by 5 p.m. to Richard S. Marvin, Housing and Property Manager, Housing and Property Management Division, City of Monterey, City Hall, Monterey, CA 93940.

Applications are now available for the City of Monterey's 2013/14 CDBG program for public services grants. Applications are available on the City's website:

<http://www.monterey.org/en-us/departments/planspublicworks/housingpropertymanagement/communityservicesgrantsprogram.aspx>

or at the Housing and Property Manager Division, 669 Van Buren Street, during public office hours. Persons or organizations interested in submitting an application must attend a Technical Workshop on January 24, 2013 at 11:30 am in the City Council chambers, 580 Pacific Street, Monterey, California. Any questions about the FY 2013/14 CDBG application process should be directed to Sandy Barajas at (831) 646-1568, or email [barajas@monterey.org](mailto:barajas@monterey.org).

Published January 8, 2013

**SE INVITA COMENTARIOS DEL PÚBLICO  
PARA EL DESARROLLO DEL PLAN DE  
VIVIENDAS Y NECESIDADES DE LA COMUNIDAD Y  
TALLER TÉCNICO DEL PROCESO DE APLICACIONES FY 2013/14 DE LOS  
OTORGAMIENTOS CONJUNTOS PARA EL DESARROLLO COMUNITARIO (CDBG)**

La Ciudad de Monterey está recaudando información para el Desarrollo de Viviendas y Necesidades de la Comunidad. Estos comentarios contribuyen al desarrollo del Plan de Acción del Año Fiscal 2013/14 y Presupuesto del Programa para el Desarrollo de Viviendas y Comunidad (HCD, por sus siglas en inglés) para el Año Fiscal 2013-14.

Estos programas ofrecen viviendas asequibles y otros servicios a los residentes de la Ciudad de Monterey con ingresos bajos y moderados. Los programas cuentan con el sustento de fondos federales, estatales y locales tales como los Otorgamientos Conjuntos para el Desarrollo Comunitario ("CDBG", por sus siglas en inglés) del Departamento de Vivienda y Desarrollo Urbano de los Estados Unidos (U.S. Department of Housing and Urban Development) ("HUD", por sus siglas en inglés).

Los comentarios y puntos de vista acerca de estas necesidades, servicios y programas (propuestos y actuales) pueden hacerse en la junta pública el jueves 24 de enero, 2013 a las 10:30 a.m. o por escrito antes de las 5 PM el 23 de enero, 2013 y enviarlas a Richard S. Marvin, gerente de la División de Vivienda y Propiedad, Ciudad de Monterey, City Hall, Monterey, CA 93940. Las aplicaciones para el Año Fiscal 2013/14 están disponibles en el sitio web de la Ciudad de Monterey:

<http://www.monterey.org/en-us/departments/planspublicworks/housingpropertymanagement/communityservicesgrantsprogram.aspx>

o pueden obtenerse en la oficina de Vivienda y Propiedad localizada en 669 Van Buren Street, Monterey durante las horas hábiles de la semana. Personas u organizaciones interesadas en aplicar, deberán atender un taller técnico mandatorio el 24 de enero, 2013 a las 11:30 a.m. en la Cámara del Concejo Municipal de Monterey, 580 Calle Pacific, Monterey, California. Si tiene alguna pregunta acerca del proceso de aplicación de los Otorgamientos Conjuntos para el Desarrollo Comunitario (CDBG) comuníquese con Sandy Barajas, (831) 646-1568 or por email: [barajas@monterey.org](mailto:barajas@monterey.org).

## NOTICE OF PUBLIC HEARING

### FISCAL YEAR 2013/14 ACTION PLAN for COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) and HOUSING PROGRAM BUDGET



## NOTIFICACIÓN DE AUDIENCIA PÚBLICA PARA EL PROPUESTO PLAN DE ACCIÓN ANUAL DEL AÑO FISCAL 2013/14 OTORGAMIENTO CONJUNTO PARA EL DESARROLLO COMUNITARIO (COMMUNITY DEVELOPMENT BLOCK GRANT)

### [CDBG, por sus siglas en inglés] Y PRESUPUESTO PARA EL DESARROLLO DE PROGRAMAS DE VIVIENDA

The City of Monterey Planning Commission will hold a Public Hearing at 4 p.m. on Tuesday, April 23, 2013. Public comments regarding the City's Draft 2013/14 Annual Action Plan for the use of Community Development Block Grant (CDBG) funds as well as the budget for housing programs will be reviewed. The views and comments of residents, public agencies and other interested parties will be considered in developing the final documents.

These documents are required by the U.S. Department of Housing and Urban Development (HUD) in order for the City to obtain federal Community Development Block Grants (CDBG) and other affordable housing funds. The City will adopt the 2013/14 Action Plan to establish the housing and community development strategies, priorities and budget for the next Fiscal Year that begins on July 1, 2013. The Draft 2013/24 Action Plan will be available for review beginning April 16, 2013, in the Planning Department, Housing and Property Management Division Office, Office of the City Clerk and the Monterey Public Library during normal office hours. In addition, this document can also be found on the City's website at <http://www.monterey.org/housing/>.

The hearing will be held in the City's Council Chambers, Few Memorial Hall at Pacific and Madison Streets, Monterey on April 23, 2013 beginning at 4:00 p.m. A second review will be held at a Public Hearing by the City Council on June 4, 2013. The Final Annual Action Plan and Fiscal Year 2013/14 Budget will be submitted to HUD in June, 2013.

If you have any questions, require an interpreter, or are elderly or handicapped and require a hearing amplification device in order to attend and understand this meeting, please contact the Housing and Property Management division Office at (831) 646-3995, or dial 7-1-1 at least 24 hours in advance of the meeting.

DATE OF PUBLICATION: APRIL 13, 2013

La Comisión de Planeamiento de la Ciudad de Monterey llevará a cabo una audiencia pública a las 4 p.m. el martes 23 de abril de 2013. Los comentarios relacionados con el Propuesto Plan de Acción Anual para el uso de fondos obtenidos del Otorgamiento Conjunto para el Desarrollo Comunitario (CDBG), así como el presupuesto para los programas de vivienda serán evaluados. Los comentarios y puntos de vista de los residentes, las agencias públicas y otras personas interesadas serán considerados para desarrollar los documentos finales.

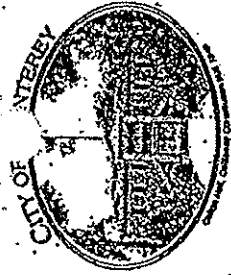
Estos documentos son requeridos por el Departamento de Vivienda y Desarrollo Urbano de los Estados Unidos (U.S. Department of Housing and Urban Development) ("HUD," por sus siglas en inglés) para que la ciudad obtenga Otorgamientos Conjuntos para el Desarrollo Comunitario ("CDBG," por sus siglas en inglés) federales y fondos para las viviendas de precio razonable. La ciudad adoptará el propuesto Plan de Acción 2013-14 el cual es un documento de planificación y establece medidas de acción para cumplir con el desarrollo de estrategias, prioridades y presupuesto para el próximo año fiscal 2013-14, el cual da comienzo el 1° de julio 2013. Una copia del Plan de Acción preliminar 2013-14 y el presupuesto estarán disponibles a la examinación del público desde el 16 de abril, 2013 en el departamento de Planificación, la oficina de Administración de Vivienda y Propiedad, la oficina del Secretario Municipal, y la biblioteca pública de Monterey durante el horario de oficina normal y por medio del Internet al siguiente sitio <http://www.monterey.org/housing/>.

La audiencia se realizará en la Cámara del Concejo Municipal de Monterey, Few Memorial Hall localizada entre las calles Pacific y Madison, el martes 23 de abril, 2013 a las 4:00 p.m. Una segunda evaluación se llevará a cabo en una audiencia pública por el Concejo Municipal el 4 de junio 2013. El Plan de Acción Final y el Presupuesto para el Año Fiscal 2013/14 serán presentados a HUD en junio del 2013.

Si usted tiene alguna pregunta, requiere un intérprete, es anciano, está minusválido y requiere aparatos de amplificación de sonido especial o asistencia para fin de asistir o entender ésta junta, por favor comuníquese con la Oficina de Administración de Vivienda y Propiedad al (831) 646-3995, o 7-1-1 cuando menos 24 horas con anticipación a la reunión.

## NOTICE OF PUBLIC HEARING

### FISCAL YEAR 2013/14 ACTION PLAN for COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG), HOUSING PROGRAM BUDGET and AMENDMENT TO CASANOVA/OAK KNOLL NEIGHBORHOOD IMPROVEMENT DISTRICT (NID)



The City of Monterey City Council and the Successor Housing Agency of the City of Monterey will hold a Public Hearing at 7 p.m. on Tuesday, June 4, 2013 to consider approval of the City's proposed 2013/14 Annual Action Plan for the use of Community Development Block Grant (CDBG) funds as well as the budget for housing programs and an Amendment to the Casanova/Oak Knoll NID. The Amendment to the Casanova/Oak Knoll NID adds a new project to the NID Strategy Plan Chart. The new project is accessible sidewalk improvements in the 800 Block of Casanova Avenue. The 2013/14 Annual Action Plan allocates funding for the accessible sidewalk improvement project.

These documents are required by the U.S. Department of Housing and Urban Development (HUD) in order for the City to obtain federal Community Development Block Grants (CDBG) and other affordable housing funds. City adoption of the 2013/14 Action Plan establishes the housing and community development strategies, priorities and budget for the next Fiscal Year that begins on July 1, 2013. The Draft 2013/14 Action Plan was published and available for review beginning April 16, 2013, in the Planning Department, Housing and Property Management Division Office, Office of the City Clerk and the Monterey Public Library during normal office hours. On April 23, 2013 the Planning Commission held a Public Hearing and reviewed the Draft Action Plan. The Planning Commission received public comment and they recommend City Council approval with minor changes regarding proposed funding for community services grants. The document can also be found on the City's website at: <http://www.monterey.org/en-us/departments/planspublicworkshousingpropertymanagement.aspx>.

The hearing will be held in the City's Council Chambers, Few Memorial Hall at Pacific and Madison Streets, Monterey on June 4, 2013 beginning at 7:00 p.m. The Final Annual Action Plan and Fiscal Year 2013/14 Budget will be submitted to HUD in June, 2013.

If you have any questions, require an interpreter, or are elderly or handicapped and require a hearing amplification device in order to attend and understand this meeting, please contact the Housing and Property Management Division Office at (831) 846-3995, or dial 7-1-1 at least 24 hours in advance of the meeting.

**PUBLISHED MAY 4, 2013**

## NOTIFICACIÓN DE AUDIENCIA PÚBLICA

### PARA EL PROYECTO PLAN DE ACCIÓN ANUAL DEL AÑO FISCAL 2013/14 OTORGAMIENTO CONJUNTO PARA EL DESARROLLO COMUNITARIO (COMMUNITY DEVELOPMENT BLOCK GRANT)

(CDBG, por sus siglas en inglés)

### PRESUPUESTO PARA EL DESARROLLO DE PROGRAMAS DE VIVIENDA Y ENMIENDA A LOS MEJORAMIENTOS DEL DISTRITO VECINDAD CASANOVA/OAK KNOLL (MDV)

El Concejo Municipal de la Ciudad de Monterey y la Agencia Sucesora de Vivienda de la Ciudad de Monterey llevarán a cabo una audiencia pública el martes 4 de junio, 2013 a las 7 p.m. para la consideración del aprobación del proyecto Plan de Acción Anual 2013/14 para el uso del Otorgamiento Conjunto para el Desarrollo Comunitario (Community Development Block Grant) (CDBG, por sus siglas en inglés), presupuesto para el desarrollo de programas de vivienda y una enmienda al Mejoramiento del Distrito de la Vecindad Casanova/Oak Knoll (MDV). La Enmienda al Mejoramiento del Distrito de la Vecindad Casanova/Oak Knoll (MDV) agregará un nuevo proyecto a la Tabla del Plan Estratégico MDV. El nuevo proyecto será mejorar el acceso a una banqueta en la cuadra 800 de la Avenida Casanova. El Plan de Acción Anual 2013/14 incluirá fondos para este proyecto de mejorar el acceso a una banqueta.

Estos documentos son requeridos por el Departamento de Vivienda y Desarrollo Urbano de los Estados Unidos (U.S. Department of Housing and Urban Development) ("HUD," por sus siglas en inglés) para que la ciudad obtenga Otorgamientos Conjuntos para el Desarrollo Comunitario ("CDBG," por sus siglas en inglés) federales y fondos para las viviendas de precio razonable. La Ciudad adoptará el proyecto Plan de Acción 2013-14 el cual es un documento de planificación y establece medidas de acción para cumplir con el desarrollo de estrategias, prioridades y presupuesto para el próximo año fiscal que dará comienzo el 1º de julio 2013. Una copia del Plan de Acción preliminar 2013-14 fue publicado y ha sido disponible a la examinación del público desde el 16 de abril, 2013 en el departamento de Planificación, la oficina de Administración de Vivienda y Propiedad, la oficina del Secretario Municipal, y la biblioteca pública de Monterey durante el horario de oficina normal. El 23 de abril, 2013, la Comisión de Planeamiento de la Ciudad de Monterey tuvo una audiencia pública y revisaron el proyecto Plan de Acción. La Comisión de Planeamiento recibió comentarios del público y recomendaron el aprobación del Concejo Municipal con pequeños cambios al presupuesto presupuesto de otorgamientos a los servicios comunitarios. El documento está accesible en el sitio internet de la Ciudad de Monterey:

<http://www.monterey.org/en-us/departments/planspublicworkshousingpropertymanagement.aspx>

La audiencia se realizará en la Cámara del Concejo Municipal de Monterey, Few Memorial Hall localizada entre las calles Pacific y Madison, el 4 de junio, 2013 a las 7:00 p.m. El Plan de Acción Final y el Presupuesto para el Año Fiscal 2013/14 serán presentados a HUD en junio del 2013.

Si usted tiene alguna pregunta, requiere un intérprete, es anciano, está minusválido y requiere aparatos de amplificación de sonido espacial o asistencia para fin de asistir o entender esta junta, por favor comuníquese con la Oficina de Administración de Vivienda y Propiedad al (831) 846-3995, o 7-1-1 cuando menos 24 horas con anticipación a la reunión.

the child.

Authorities said they believe Matos is Ismael Tristan Santisteban's father, but a DNA test is pending.

"I love my son and I hope that he's safe right now," Matos said to reporters as he was led to a police car outside the hotel. He denied killing the victims or knowing who did. Officials said an investigator who specializes in talking to autistic children was interviewing Ismael. They were not sure whether he might have witnessed the killings.

The names of the four victims had not been released because the medical examiner hadn't positively identified the bodies, which were found in nearby Hudson, Pasco County Sheriff Chris Nocco said.

Matos is the only suspect in their deaths, authorities said, but they released only a few details about what led them to the man, who had recently come to Florida from Pennsylvania's Lehigh Valley.

Court records there show he had been arrested numerous times for harassment, theft, burglary, trespassing, assault and driving under the influence. He pleaded guilty to some of the charges, and others appear to have been dismissed.

The boy had last been seen at his Pasco County home Aug. 28. The boy's mother called police and said Matos had threatened her with a knife and then fled, Nocco said.



### \*\*\* NOTICE \*\*\*

#### PUBLIC HEARING ON HOUSING PROGRAMS AND AVAILABILITY OF DRAFT REPORTS

Consolidated Annual Performance and Evaluation Report (CAPER) for Community Development Block Grant (CDBG) Funds and HOME Grant Funds

The City of Monterey has prepared its draft Consolidated Annual Performance and Evaluation Report ("Report") on Housing Programs for the period of July 1, 2013 through June 30, 2014. The Report contains the following information:

1. Financial data on revenues, activities, expenditures and accomplishments in programs for the following households: a) Very Low Income; b) Low Income; c) Moderate-Income.
2. Narrative reports comparing the relationship of community needs and the use of funds to the objectives in the City's Consolidated Plan for Housing Programs.

This draft Report will be available for review beginning September 8, 2014 at the Monterey Public Library, Office of the City Clerk, Office of Housing and Property Management, and the Planning Office during normal business hours.

The Planning Commission of the City of Monterey will conduct a Public Hearing on September 23, 2014 at 4:00 p.m. in the City Council Chambers, Few Memorial Hall, corner of Madison and Pacific Streets, Monterey. The purpose of this hearing is to review the reports, take public comments and recommend the CAPER submission to the U.S. Department of Housing and Urban Development (HUD). Citizens may attend the Public Hearing to provide input, or address comments in writing to Rick Marvin, Housing and Property Manager, City of Monterey, City Hall, Monterey, CA 93940.

The City of Monterey is committed to include the disabled in all of its services, programs and activities. For disabled access to the City, dial 711 to use the California Relay Service (CRS) to speak to City offices. CRS offers free text-to-speech, speech-to-speech, and Spanish-language services 24 hours a day, 7 days a week. If you require a hearing amplification device to attend a meeting, dial 711 to use CRS to talk to the City Clerk's Office at (831) 646-3935 to coordinate use of a device or for information on an agenda.

The City of Monterey does not discriminate against minorities or other disadvantaged persons or groups. Any inquiries as to information and/or services related to the City's Housing and Community Development (HCD) Programs should contact the City's Housing and Property Management Office at (831) 646-3995.

Publication date: September 6, 2014.

### \*\*\* NOTIFICACIÓN \*\*\*

#### AUDIENCIA PÚBLICA DE PROGRAMAS DE VIVIENDA Y DISPONIBILIDAD DE REPORTES PRELIMINARES

Informe Consolidado de Desempeño Anual y Evaluación (Consolidated Annual Performance and Evaluation Report) (CAPER, por sus siglas en inglés) para: Fondos de Otorgamiento Comunitario para el Desarrollo de la Comunidad (Community Development Block Grant) (CDBG, por sus siglas en inglés) y Fondos de Otorgamiento HOME

La ciudad de Monterey ha preparado su Informe Desempeño Anual Preliminar sobre Programas de Vivienda para el período de 1o. de Julio 2013 hasta e incluyendo el 30 de Junio 2014. El Informe incluye la siguiente información:

1. Datos financieros sobre ganancias, actividades, gastos y logros de los programas para hogares de: a) Muy bajos ingresos; b) Bajos ingresos; y c) Ingresos medianos.
2. Informes narrativos que comparan la relación entre las necesidades de la comunidad y el uso de fondos con los objetivos de los Programas del Plan Consolidado de Vivienda de la Ciudad.

Este informe preliminar estará disponible para su evaluación a partir del 8 de septiembre, 2014 en la Biblioteca Pública, la Oficina del Secretario Municipal (Office of the City Clerk), la Oficina de Vivienda y Administración de Propiedad (Office of Housing and Property Management) y la Oficina de Planificación durante el horario normal de atención.

La Comisión de Planificación de la Ciudad de Monterey llevará a cabo una audiencia pública el 23 de septiembre, 2014 a las 4:00 p.m. en el salón del Concejo Municipal, Few Memorial Hall, ubicado en la esquina de las Calles Madison y Pacific, Monterey. El propósito de esta audiencia es revisar los informes, registrar comentarios públicos y recomendar la presentación del CAPER al Departamento de Vivienda y Desarrollo Urbano de los Estados Unidos (U.S. Department of Housing and Urban Development, HUD por sus siglas en inglés). Los ciudadanos pueden asistir a la audiencia pública para ofrecer sus comentarios o enviarlos por correo a Rick Marvin, gerente de la Oficina de Vivienda y Administración de Propiedad, City of Monterey, City Hall, Monterey, CA 93940.

La Ciudad de Monterey está comprometida a incluir las personas con discapacidades en sus servicios, programas y actividades. Para obtener acceso a la Ciudad, marque 711 para usar el Servicio de Relato de California (CRS, por sus siglas en inglés) para comunicarse con las oficinas de la Ciudad. CRS ofrece gratis texto-a-voz, voz-a-voz, así como servicios en español 24 horas al día, los siete días de la semana. Si usted requiere amplificación auditiva para asistir a la junta, marque 711 para utilizar el CRS y hablar directamente con la Oficina del Secretario Municipal al (831) 646-3935 y pida acceso al uso del sistema de amplificación ó para más información acerca de la agenda.

La Ciudad de Monterey no discrimina contra las personas de grupos minoritarios ni a otros grupos o personas con discapacidades. Para hacer preguntas sobre como dichas personas pueden recibir asistencia, obtener información y/o servicios relacionados con los Programas de Vivienda y Desarrollo Comunitario (HCD, por sus siglas en inglés) de la ciudad, comuníquese con la Oficina de Vivienda y Administración de Propiedad llamando al (831) 646-3995.

Fecha de publicación: 6 de septiembre, 2014.

# **CITY OF MONTEREY**

**CAPER FY 2013/14**

## **EXHIBIT G**

**IDIS REPORTS:**

**PR06**

**PR23**

## OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT

PR06 - Summary of Consolidated Plan Projects for Report  
Year

Plan IDIS Year Project	Project Title and Description	Program	Project Estimate	Committed Amount	Amount Drawn Thru Report Year
2013 1	Planning/Administration	CDBG	\$145,929.00	\$150,718.00	\$0.00
	Provide general staf administration of CDBG programs abd activities, including Integrated Disbursement and Information System (IDIS) administration, program set-up, reporting, planning and subrecipient training and monitoring.				
2	Alliance on Aging -CS	CDBG	\$10,000.00	\$10,000.00	\$7,500.00
	Elderly Services-provide tax assistance and access to Ombudsman Program				
3	Community Human Services	CDBG	\$1,000.00	\$1,000.00	\$750.00
	Youth Services-provide services to homeless run-away youth and to intervene in the homeless cycle				
4	Food Bank	CDBG	\$15,000.00	\$15,000.00	\$11,250.00
	Continue the provision and expansion of emergency food assistance program that targets low income seniors, disabled, and homeless, and underemployed in low income neighborhoods of north monterey.				
5	INTERIM Inc.	CDBG	\$5,000.00	\$5,000.00	\$3,750.00
	Provide emergency and temporary housing outreach and case management services for mentally ill single adults the the MCHome program				
6	Legal Services for Seniors-CS	CDBG	\$15,000.00	\$15,000.00	\$11,250.00
	Provide outreach, education, legal advocacy, information & referral, public benefit advocacy, elder abuse prevention, consumer fraud prevention for elderly citizens.				
7	Meals on Wheels	CDBG	\$10,000.00	\$10,000.00	\$7,500.00
	Meal Delivery to homebound seniors and disabled individuals				
8	Salvation Army	CDBG	\$10,000.00	\$10,000.00	\$7,500.00
	Emergency Rental Assistance and homeless prevention services to persons at risk of homelessness from permanent residence.				
9	Shelter Outreach - I-HELP	CDBG	\$14,000.00	\$10,500.00	\$10,500.00
	Provide supportive services as an emergency shelter for men as part of a continuum care				
10	Purchase and Rehabilitation-Ownership	CDBG	\$50,000.00	\$174,370.00	\$50,000.00
	Purchase homes that are rehabilitated and converted to ownership or lease to own program.				
11	Major Rehabilitation Loans	CDBG	\$120,000.00	\$120,000.00	\$120,000.00
	Major Rehabilitation projects for low-income senior or disabled individuals to ensure property is brought up to Housing Quality standards or local building codes.				
12	Mr. Fixit Grants	CDBG	\$30,000.00	\$30,000.00	\$30,000.00
	Provide small grants to low income seniors and disabled heads of households for make repairs for Housing Quality Standards to assist them in their homes.				

## OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT

PR06 - Summary of Consolidated Plan Projects for Report  
Year

Plan IDIS Year Project	Project Title and Description	Program	Amount Available to Draw	Amount Drawn in Report Year
2013 1	Planning/Administration	CDBG	\$150,718.00	\$0.00
	Provide general stat administration of CDBG programs abd activities, including Integrated Disbursement and Information System (IDIS) administration, program set-up, reporting, planning and subrecipient training and monitoring.			
2	Alliance on Aging -CS	CDBG	\$2,500.00	\$7,500.00
3	Community Human Services	CDBG	\$250.00	\$750.00
4	Food Bank	CDBG	\$3,750.00	\$11,250.00
	Elderly Services-provide tax assistance and access to Ombudsman Program			
	Youth Services-provide services to homeless run-away youth and to intervene in the homeless cycle			
	Continue the provision and expansion of emergency food assistance program that targets low income seniors, disabled, and homeless, and underemployed in low income neighborhoods of north monterey.			
5	INTERIM Inc.	CDBG	\$1,250.00	\$3,750.00
	Provide emergency and temporary housing outreach and case management services for mentally ill single adults the the MCHome program			
6	Legal Services for Seniors-CS	CDBG	\$3,750.00	\$11,250.00
	Provide outreach, education, legal advocacy, information & referral, public benefit advocacy, elder abuse prevention, consumer fraud prevention, for elderly citizens.			
7	Meals on Wheels	CDBG	\$2,500.00	\$7,500.00
	Meal Delivery to homebound seniors and disabled individuals			
8	Salvation Army	CDBG	\$2,500.00	\$7,500.00
	Emergency Rental Assistance and homeless prevention services to persons at risk of homelessness from permanent residence.			
9	Shelter Outreach - I-HELP	CDBG	\$0.00	\$10,500.00
	Provide supportive services as an emergency shelter for men as part of a continuum care			
10	Purchase and Rehabilitation-Ownership	CDBG	\$124,370.00	\$50,000.00
	Purchase homes that are rehabilitated and converted to ownership or lease to own program.			
11	Major Rehabilitation Loans	CDBG	\$0.00	\$120,000.00
	Major Rehabilitation projects for low-income senior or disabled individuals to ensure property is brought up to Housing Quality standards or local building codes.			
12	Mr. Fixit Grants	CDBG	\$0.00	\$30,000.00
	Provide small grants to low income seniors and disabled heads of households for make repairs for Housing Quality Standards to assist them in their homes.			

## OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT

PR06 - Summary of Consolidated Plan Projects for Report  
Year

Plan IDIS Year Project	Project Title and Description	Program	Project Estimate	Committed Amount	Amount Drawn Thru Report Year
2013 13	Home Safety Grants	CDBG	\$30,000.00	\$30,000.00	\$30,000.00
	Provide small grants to low income seniors and disabled heads of households for home safety repairs to meet Health and Safety Quality Standards.				
14	Home Accessibility Grants-Disabled Accessibility	CDBG	\$30,000.00	\$30,000.00	\$30,000.00
	Provide small grants to low income seniors and disabled heads of households for home safety repairs to meet Health and Safety Quality Standards.				
15	Project Delivery-Housing	CDBG	\$132,190.00	\$132,190.00	\$132,190.00
	Administer Housing activities in compliance with the regulations of local policies.				
16	Code Enforcement	CDBG	\$57,572.00	\$57,572.00	\$57,572.00
	Code enforcement in low income block groups, including focus on Casanova Oak Knoll Neighborhood Improvement District and neighboring areas.				
17	Neighborhood Activity-(NRSA)	CDBG	\$67,000.00	\$67,000.00	\$0.00
	Utilization of funds under HUD Neighborhood Revitalization Strategy Area (NRSA) Program, in accordance with 43.4 percent area low-income benefit standard to implement projects accessible sidewalk projects to assist the elderly residents to conveniently access neighborhood retail, restaurant and grocery in a collaboration-based neighborhood improvement district strategy. This project will require amending the NRSA plan to place accessible sidewalks as a high priority need it is currently identified as a low priority need. Accessible pedestrian sidewalk improvement project				
18	Outreach Rehabilitation grants-CONA	CDBG	\$5,000.00	\$4,124.00	\$0.00
	Coordinate with code enforcement efforts in CONA to provide leads and contact for potential rehabilitation loans and grants. Provide targeted outreach to the CONA area for rehabilitation grant programs. Increase rehabilitation grants in CONA.				
19	Down Payment Assistance	CDBG	\$35,000.00	\$0.00	\$0.00
	Down Payment Assistance for low income potential homeowners in lease to own or other programs.				
20	Van Buren Low Income Housing-Technical Studies	CDBG	\$15,000.00	\$0.00	\$0.00
	Van Buren Construction of low-income housing construction-Technical Studies. Multi year activity technical studies involving the design and selection of a community housing development organization to finance and construct low-income rental housing.				

## OFFICE OF COMMUNITY PLANNING AND DEVELOPMENT

PR06 - Summary of Consolidated Plan Projects for Report  
Year

Plan IDIS Year Project	Project Title and Description	Program	Amount Available to Draw	Amount Drawn in Report Year
2013 13	Home Safety Grants	CDBG	\$0.00	\$30,000.00
	Provide small grants to low income seniors and disabled heads of households for home safety repairs to meet Health and Safety Quality Standards.			
14	Home Accessibility Grants-Disabled Accessibility	CDBG	\$0.00	\$30,000.00
	Provide small grants to low income seniors and disabled heads of households for home safety repairs to meet Health and Safety Quality Standards.			
15	Project Delivery-Housing	CDBG	\$0.00	\$132,190.00
	Administer Housing activities in compliance with the regulations of local policies.			
16	Code Enforcement	CDBG	\$0.00	\$57,572.00
	Code enforcement in low income block groups, including focus on Casanova Oak Knoll Neighborhood Improvement District and neighboring areas.			
17	Neighborhood Activity-(NRSA)	CDBG	\$67,000.00	\$0.00
	Utilization of funds under HUD Neighborhood Revitalization Strategy Area (NRSA) Program, in accordance with 43.4 percent area low-income benefit standard to implement projects accessible sidewalk projects to assist the elderly residents to conveniently access neighborhood retail, restaurant and grocery in a collaboration-based neighborhood improvement district strategy. This project will require amending the NRSA plan to place accessible sidewalks as a high priority need it is currently identified as a low priority need. Accessible pedestrian sidewalk improvement project			
18	Outreach Rehabilitation grants-CONA	CDBG	\$4,124.00	\$0.00
	Coordinate with code enforcement efforts in CONA to provide leads and contact for potential rehabilitation loans and grants. Provide targeted outreach to the CONA area for rehabilitation grant programs. Increase rehabilitation grants in CONA.			
19	Down Payment Assistance	CDBG	\$0.00	\$0.00
	Down Payment Assistance for low income potential homeowners in lease to own or other programs.			
20	Van Buren Low Income Housing-Technical Studies	CDBG	\$0.00	\$0.00
	Van Buren Construction of low-income housing construction-Technical Studies. Multi year activity technical studies involving the design and selection of a community housing development organization to finance and construct low-income rental housing.			



MONTEREY

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

Activity Group	Activity Category	Underway Count	Underway Activities Disbursed	Completed Count	Completed Activities Disbursed	Program Year Count	Total Activities Disbursed
Housing	Direct Homeownership Assistance (13)	0	\$0.00	1	\$0.00	1	\$0.00
	Rehab; Single-Unit Residential (14A)	0	\$0.00	9	\$210,000.00	9	\$210,000.00
	Acquisition for Rehabilitation (14G)	0	\$0.00	5	\$293,902.00	5	\$293,902.00
	Rehabilitation Administration (14H)	0	\$0.00	2	\$132,190.00	2	\$132,190.00
	Code Enforcement (15)	0	\$0.00	3	\$115,434.00	3	\$115,434.00
	<b>Total Housing</b>	<b>0</b>	<b>\$0.00</b>	<b>20</b>	<b>\$751,526.00</b>	<b>20</b>	<b>\$751,526.00</b>
Public Facilities and Improvements	Sidewalks (03L)	0	\$0.00	1	\$0.00	1	\$0.00
	Non-Residential Historic Preservation (16B)	0	\$0.00	2	\$69,250.00	2	\$69,250.00
	<b>Total Public Facilities and Improvements</b>	<b>0</b>	<b>\$0.00</b>	<b>3</b>	<b>\$69,250.00</b>	<b>3</b>	<b>\$69,250.00</b>
Public Services	Operating Costs of Homeless/AIDS Patients Programs (03T)	0	\$0.00	4	\$14,250.00	4	\$14,250.00
	Public Services (General) (05)	0	\$0.00	2	\$0.00	2	\$0.00
	Senior Services (05A)	0	\$0.00	6	\$26,250.00	6	\$26,250.00
	Handicapped Services (05B)	0	\$0.00	1	\$0.00	1	\$0.00
	Youth Services (05D)	0	\$0.00	2	\$750.00	2	\$750.00
	Battered and Abused Spouses (05G)	0	\$0.00	1	\$0.00	1	\$0.00
	Subsistence Payment (05Q)	0	\$0.00	1	\$7,500.00	1	\$7,500.00
	Housing Counseling (05U)	0	\$0.00	2	\$0.00	2	\$0.00
	Neighborhood Cleanups (05V)	0	\$0.00	1	\$0.00	1	\$0.00
	Food Banks (05W)	0	\$0.00	2	\$11,250.00	2	\$11,250.00
	<b>Total Public Services</b>	<b>0</b>	<b>\$0.00</b>	<b>22</b>	<b>\$60,000.00</b>	<b>22</b>	<b>\$60,000.00</b>
General Administration and Planning	Planning (20)	0	\$0.00	2	\$0.00	2	\$0.00
	General Program Administration (21A)	0	\$0.00	3	\$0.00	3	\$0.00
	Public Information (21C)	1	\$15,175.00	1	\$0.00	2	\$15,175.00
Total General Administration and Planning	<b>Total General Administration and Planning</b>	<b>1</b>	<b>\$15,175.00</b>	<b>6</b>	<b>\$0.00</b>	<b>7</b>	<b>\$15,175.00</b>
	Unprogrammed Funds (22)	1	\$0.00	0	\$0.00	1	\$0.00
	<b>Total Other</b>	<b>1</b>	<b>\$0.00</b>	<b>0</b>	<b>\$0.00</b>	<b>1</b>	<b>\$0.00</b>
<b>Grand Total</b>		<b>2</b>	<b>\$15,175.00</b>	<b>51</b>	<b>\$880,776.00</b>	<b>53</b>	<b>\$895,951.00</b>



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: 2013

DATE: 09-30-14  
TIME: 14:04  
PAGE: 2

MONTEREY

CDBG Sum of Actual Accomplishments by Activity Group and Accomplishment Type

Activity Group	Matrix Code	Accomplishment Type	Open Count	Completed Count	Program Year Totals
Housing	Rehab; Single-Unit Residential (14A)	Housing Units	0	53	53
	Acquisition for Rehabilitation (14G)	Housing Units	0	7	7
	Rehabilitation Administration (14H)	Housing Units	0	5,395	5,395
	Code Enforcement (15)	Persons	0	10,445	10,445
		Housing Units	0	6,006	6,006
<b>Total Housing</b>			<b>0</b>	<b>21,906</b>	<b>21,906</b>
Public Facilities and Improvements	Sidewalks (03L)	Persons	0	6,085	6,085
	Non-Residential Historic Preservation (16B)	Business	0	566	566
	<b>Total Public Facilities and Improvements</b>		<b>0</b>	<b>6,651</b>	<b>6,651</b>
Public Services	Operating Costs of Homeless/AIDS Patients Programs (03T)	Persons	0	498	498
	Public Services (General) (05)	Persons	0	10,225	10,225
	Senior Services (05A)	Persons	0	1,726	1,726
	Handicapped Services (05B)	Persons	0	34	34
	Youth Services (05D)	Persons	0	530	530
	Battered and Abused Spouses (05G)	Persons	0	43	43
	Subsistence Payment (05Q)	Persons	0	42	42
	Housing Counseling (05U)	Households	0	66	66
	Neighborhood Cleanups (05V)	Persons	0	12,012	12,012
	Food Banks (05W)	Persons	0	620	620
	<b>Total Public Services</b>		<b>0</b>	<b>25,796</b>	<b>25,796</b>
<b>Grand Total</b>			<b>0</b>	<b>54,353</b>	<b>54,353</b>



MONTEREY

CDBG Beneficiaries by Racial / Ethnic Category

Housing-Non Housing	Race	Total Persons	Total Hispanic Persons	Total Households	Total Hispanic Households
Housing	White	0	0	0	0
Non Housing	<b>Total Housing</b>	<b>0</b>	<b>0</b>	<b>60</b>	<b>5</b>
	White	2,329	350	10	0
	Black/African American	196	0	1	0
	Asian	178	3	0	0
	American Indian/Alaskan Native	14	2	0	0
	Native Hawaiian/Other Pacific Islander	31	1	0	0
	American Indian/Alaskan Native & White	10	0	0	0
	Asian & White	6	1	39	0
	Black/African American & White	16	3	0	0
	Amer. Indian/Alaskan Native & Black/African Amer.	1	0	0	0
	Other multi-racial	92	2	16	0
Grand Total	<b>Total Non Housing</b>	<b>2,873</b>	<b>362</b>	<b>66</b>	<b>0</b>
	White	2,688	376	70	5
	Black/African American	220	1	1	0
	Asian	215	5	0	0
	American Indian/Alaskan Native	22	3	0	0
	Native Hawaiian/Other Pacific Islander	34	1	0	0
	American Indian/Alaskan Native & White	18	2	0	0
	Asian & White	6	1	39	0
	Black/African American & White	20	3	0	0
	Amer. Indian/Alaskan Native & Black/African Amer.	1	0	0	0
	Other multi-racial	269	102	16	0
	<b>Total Grand Total</b>	<b>3,493</b>	<b>494</b>	<b>126</b>	<b>5</b>



MONTEREY

CDBG Beneficiaries by Income Category

Income Levels		Owner Occupied	Renter Occupied	Persons
Housing	Extremely Low ( $\leq 30\%$ )	16	0	0
	Low ( $>30\%$ and $\leq 50\%$ )	10	0	0
	Mod ( $>50\%$ and $\leq 80\%$ )	0	0	0
	Total Low-Mod	26	0	0
	Non Low-Mod ( $>80\%$ )	0	0	0
	Total Beneficiaries	26	0	0
	Extremely Low ( $\leq 30\%$ )	0	0	749
	Low ( $>30\%$ and $\leq 50\%$ )	0	0	425
	Mod ( $>50\%$ and $\leq 80\%$ )	0	0	196
	Total Low-Mod	0	0	1,370
Non Housing	Non Low-Mod ( $>80\%$ )	0	0	74
	Total Beneficiaries	0	0	1,444