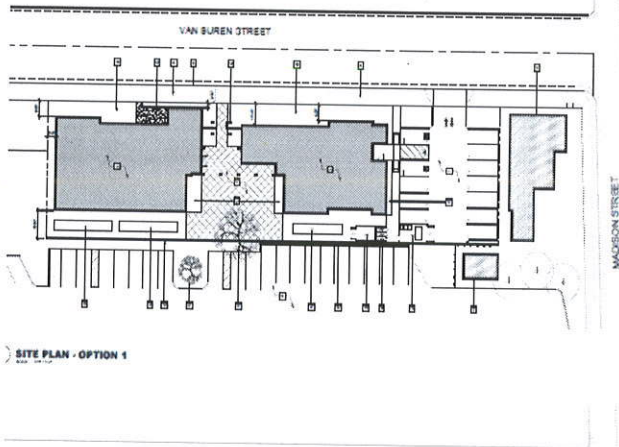




Van Buren Senior Housing Concept



# CITY OF MONTEREY

## FY 2014-15 CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER) (PROGRAM YEAR 2014)



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## 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 2014, which is Fiscal Year (FY) 2014/2015. Program Year 2014 began on July 1, 2014 and ended on June 30, 2015. 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 2014, the City of Monterey's priorities and implementation activities remained consistent with the Consolidated Plan adopted in FY 2010/2015. This program year reports on the City's fifth year progress in meeting the goals and objectives in the Consolidated Plan.

In Program Year 2014, the City of Monterey continued existing programs, with emphasis on homeless services, negotiating agreements with Mid-Peninsula The Farm, Inc. that will facilitate development of a 19-unit affordable senior rental project in the 600 Block of Van Buren Street, community services to assist senior and disabled households, and housing rehabilitation services to assist low-income senior and disabled households remain in their housing. The Van Buren property that will be developed as affordable housing was purchased with CDBG funds in 2000 and 2002. The City intends development of a 19-unit apartment project on the property to achieve a Low and Moderate Income National Objective. In the past Program Year, the City selected a developer for the project and executed an Exclusive Negotiating Rights Agreement, a Right of Entry Agreement and a Pre-development Loan Agreement. Negotiations for a disposition and development agreement and ground lease are currently in process.

### **Major accomplishments**

- Spent \$126,050 in CDBG funded community services grants to ten local non-profit agencies that provided assistance to Low and Moderate-Income individuals and families. A total of 1440 individuals were proved 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 Block Group 02 and adjacent Block Groups 03, 04 that contain at least 43.4% low-income households.

Through this targeted code enforcement effort the City addressed 60 code violations in the CONA area. A total of 65 code violations were investigated in other adjacent low-income census block groups for a total code violation investigation count of 125. A total of 113 of these investigations were resolved. Twelve complaints are continuing and pending resolution.

- 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 1 major housing rehabilitation loans and 31 housing rehabilitation grants for a total direct expenditure on improvement projects of \$ 195,000. These CDBG expenditures assisted Low-Income, senior and disabled households to remain in their homes through the CDBG funded repair programs. The City administers four (4) different CDBG repair programs. These programs are Major Rehabilitation Loans, Mr. Fix-it repairs, Home Safety repairs and the Handicapped Accessibility improvements. These rehabilitation programs support City housing goals and a HUD national objective to benefit low and moderate-income persons.
- Used CDBG funds to purchase and rehabilitate a deed restricted Low-Income affordable housing unit in the CONA area. Through this purchase the City preserves an affordable housing unit and prevents it from converting to market rate pricing.
- Selected Mid-Peninsula The Farm, LLC to be the City's negotiating partner and developer of a 19-unit affordable senior apartment project on City-owned land on the 600 Block of Van Buren Avenue. The Developer and the City have executed an Exclusive Negotiating Rights Agreement (ENA) and a Pre-development Loan Agreement. Planning entitlements for the project have been approved. The developer received a letter of commitment for project based rental assistance from the Housing Authority of the County of Monterey and has submitted an application for HOME funds to finance the construction.
- Continued work to complete the Monterey Hotel apartments. Staff prepared and published a Request for Proposals (RFP) to solicit proposals from qualified developers to complete eighteen (18) affordable apartment units that are partially built in the residential component of this mixed-use project. Successor Housing Agency funds will be used for to cover all expenses related to completing the apartment portion of the project. No CDBG funds have been or are planned to be utilized in the Monterey Hotel apartment project.
- Prepared and adopted a Substantial Amendment to FY 2014-15 Action Plan to describe a detailed plan for spending a substantial build-up in CDBG program income; and established a plan for spending down the build-up of Entitlement funds in the City's Line of Credit with HUD. Both of these spending plans received HUD approval and they will be implemented over the course of the FY 2015-16.

**Summary: CDBG Funds for FY 2014-15**

Entitlement Grant	Unexpended Previous Years Entitlement	Program Income 2014/15	Carry over PI from Previous Years	Total Available 2014/15	Expenditures 2014/15	Carry-Over to FY 2015/2016
\$183,890	\$430,724	\$535,043	\$959,678	\$2,109,335	\$865,826	\$1,252,509

As shown in the above summary table the total amount of available CDBG funds in FY 2014/15 was \$2,109,335. Total amount of CDBG funds expended in FY 2014/15 is \$856,826. The amount of CDBG funds carrying over to FY 2015/16 is \$1,252,509.

The large amount of Carry-Over funds are intended to be spent in FY2015/16 in accordance with two HUD approved spending plans. These plans are: 1) Substantial Amendment to FY 2014/15 Action Plan for CDBG Program; and Informal Consultation-Noncompliance with Timely Expenditure Requirements. The spending allocation between these plans is summarized below:

**Summary: CDBG Approved Spending Plans for Carry-Over Funds**

Total Carry-Over To 2015/16	Substantial Amendment Spending Plan 2015/16	Informal Consultation Spending Plan 2015/16	Unallocated Carry-Over Funds to 2015/16 Action Plan
\$1,252,509	\$962,704	\$289,805	\$0

**Review Process and Public Notice**

On November 10, 2015, 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 October 17, 2015.

All public comments presented with regard to the draft CAPER are presented and responded to below: (Note no public comments received at this time. Comments received during the Public Hearing will be noted 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 2014/15, as well as unspent program income from previous years. The majority of CDBG Program Income (PI) funds are generated annually by the land lease for the Hotel Pacific. Rehabilitation and down payment assistance loan payoffs and resale of CDBG funded purchases of deed restricted Low-Income affordable housing units also contribute to the City's PI account, though these sources are less predictable on an annual basis.

Since Program Year 2010-11 the City has not met CDBG spending objectives. HUD notified the City of its concern over the build-up of unexpended Entitlement and Program Income funds. In response the City (i) prepared and adopted a Substantial Amendment to FY 2014-15 Action Plan (Substantial Amendment) that established a detailed plan for spending the build-up in program income, and (ii) a plan for spending down the build-up of Entitlement funds. Both of these spending plans received HUD approval and they will be implemented over the course of the FY 2015-16.

The following chart identifies total amount of resources were available to the City during this past Program Year.

#### **Available Resources – Program Year 2014-15 (Program Year 2014)**

Entitlement Grant	Unexpended Entitlement 2011/12 2012/13 2013/14	Program Income (PI) Received 2014/15	Unexpended Carry over PI 2010/11 2011/12 2012/13 2013/14	Expenditures 2014/15	Carry Forward to 2015/2016
\$183,890	\$430,724*	\$535,043	\$962,704**	\$865,862	\$1,252,509

\*To be spent down consistent with HUD approved Informal Consultation Timely Expenditure Plan

\*\*To be spend down consistent with HUD approved Substantial Amendment

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

The Successor Housing Agency (SHA) Housing Trust is comprised of preserved assets of the City's former RDA. These assets include annual loan and interest payment revenue, pay-off of down payment assistance loans, proceeds received from the sale of deed restricted affordable ownership housing units that had been purchased with former RDA housing funds, and State Department of Finance (DOF) approved funds to complete 18 affordable Very Low, Low and Moderate-Income apartments in the Monterey Hotel mixed-use project. Proceeds from the sale of these housing assets and/or loan payments are SHA program income (SHA PI). They represent the source of funds for future Low and Moderate-Income Housing activities (LMIH programs) that will ensure the City's continued compliance with State of California Redevelopment Law.



A total 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 remaining funds. The affordable LMIH apartment units are expected to be completed in 2016.

**Available Resources - Successor Housing Agency Program Year 2014-15**

SHA Carryover from 2013/14	SHA 2014/15 PI	SHA 2014/15 Expenditures	SHA Carry-Over to 2015/16
\$1,989,900	\$121,692	\$489,195	\$1,622,397

The majority of SHA Carry-Over funds are obligated to be spent on the Monterey Hotel Apartment project. These obligated funds total \$1,557,401. They will be used in FY 2015/16 to fund completion of the apartments and associated professional services contracts for legal, construction management, architectural services and minor water damage remediation projects. The remaining \$64,996 is available for spending on other LMIH activities, such as rehabilitation of purchased units or leverage with CDBG funds to facilitate purchase of deed restricted units.

**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 2014 no down payment assistance was provided. In the Program Year City staff's focus with regard to its first-time homebuyer program was on preparing City owned LMIH units for resale to qualified Low-Income first-time homebuyers.

During the Program Year one unit was purchased at 820 Casanova Avenue and another unit, at 565 English Avenue was sold. The purchased unit was also rehabilitated and it is now ready for resale. At the end of the Program Year the City was in contract with a local real estate broker and is actively marketing three units for sale and processing requests to purchase another three units, one of which was purchased on August 11, 2015. All of these units will be purchased with CDBG or SHA funds and their resale to qualified Low-Income buyers will meet the City's obligations to preserve LMIH and meet HUD established national objective to assist Low-Income households and individuals. Sale of these units will also produce new program income that will be distributed into the appropriate LMIH fund.

In respect to the Casa de la Estrella 8-unit apartment project the City's HOME program supports monitoring of property management performance and funding support for repair, maintenance and savings for future capital repairs. Minor capital repair projects related to balcony repair and security gates were completed in the Program Year.

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

**Available Resource – HOME Programs Program Year 2014/15**

FY 2013/14 Carry-Over Estrella	Down Payment Assistance Carry-Over	FY 2014/15 Received Estrella	FY 2014/15 Total Expenses Estrella	Estrella Carry-Over to FY 2015/16	Down Payment Assistance Carry-Over FY 2015/16
\$118,523	\$31,329.00	\$11,800.00	\$48,744.00	\$112,908	\$31,329.00

The Estrella carry-over funds will be saved for future capital repairs. The down payment assistance carry-over funds will be utilized for opportunity sale of privately owned deed restricted unit to a qualified first-time homebuyer. These down payment assistance funds are not permitted to assist the City is selling a City-owned unit.

## II. LEVERAGING RESOURCES

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

#### 1. Administration:

\$155,704.00 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 \$118,053 were awarded to ten (10) non-profit agencies in FY 2014-15. Together the funded agencies assisted a total of 1440 low-income individuals. The services provided with the assistance of these funds included counseling, meal delivery for seniors, senior advocacy and legal aid, supportive water based physical therapy for disabled individuals, mental health supportive services, outreach and overnight shelter for individuals experiencing homelessness.

Highlights of Community Service Grants Outcomes for Monterey citizens include:

- **Alliance on Aging.** Assisted 302 Monterey seniors with tax returns with 95% percent of those helped at below Moderate-Income.
- **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 272 runaway and homeless youth in the City of Monterey with 98.2% of those helped at below Moderate-Income.
- **The Food Bank of Monterey County's Emergency Food Assistance Program.** Distributed 869 bags and boxes of food to 234 all recipients of this supplemental food aid are Very Low-Income or below 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.



- **Interim, Inc.** Assisted 40 individuals experiencing homelessness and psychiatric disabilities were assisted by Interim, Inc. through its McHome outreach program. Services included street outreach and supportive emergency housing.
- **Josephine Kerns Memorial Pool.** Assisted 31 disabled individuals by providing warm water exercise and therapy. Eighty percent of the individuals assisted are at or below Moderate-Income.
- **Legal Services for Seniors.** Assisted 241 seniors with 97.1% Below Moderate-Income by providing free legal services by licensed attorneys and competent legal advocates. 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 173 homebound Extremely Low, Very low, Low and Moderate-Income, frail elderly and disabled adults. In each Quarter of 2014-15 at least 15 of these homebound seniors were located in Tract 133.
- **The Salvation Army Corps.** Provided emergency rental assistance, emergency housing for hospital discharges and transportation assistance to 50 low income households.
- **Shelter Outreach Plus** Served 51 individual homeless single Monterey men with mental health assessment, housing referrals and medical care referrals.
- **YWCA-Monterey County.** Served 46 individuals with emergency shelter for those experiencing domestic abuse. These individuals received a total of 885 shelter nights. All of the assisted individuals are Low-Income or below.

### 3. Housing Rehabilitation Program

One Major Housing Rehabilitation Loans was funded in FY 2014-15 for \$90,000.00. The project that has been funded is on-going and was incomplete at the end of the Fiscal Year. This project will be completed in FY 2015-16. A total of \$105,000.00 was expended in FY 2014/15 for rehabilitation grants. These included Mr. Fix It, Home Safety and Housing Accessibility Grants. A total of 31 rehabilitation grants were issued and they were utilized at 13 different properties in the City. Recipients of housing rehabilitation program assistance were primarily senior citizens. Multiple grants are provided when it has been determined that a Major Rehabilitation Loan will not be accepted and correction of identified health and safety deficiencies cannot be corrected with a single grant.

### 4. Code Enforcement

The Code Compliance Coordinator (Coordinator) is funded .5 FTE by CDBG funds investigated 109 code enforcement cases to reduce deteriorating property conditions in the low income areas of the City contained within Tract 133 (Tract 133 Block Groups 02, 03 and 04). In FY 2014/15 a total amount of \$42,117.10 was expended on Code Compliance in these Low-Income Census Block Group areas. In these areas the Coordinator addresses blighting conditions such as neglected foreclosures, hoarding conditions, inoperable vehicles stored in yards, and health and safety concerns. Representative types of cases included animal waste, illegal occupancy of recreational vehicles, short-term rentals, materials discarded in the right-of-way, illegal home business occupations, unauthorized commercial signs, noise, sidewalk trip hazards, outdoor storage,

sidewalk obstruction, unauthorized accessory structures, and commercial business sales in the right-of-way.

The Coordinator works in conjunction with the North Fremont Street Business Association, CONA neighborhood and adjacent Low-Income residential neighborhoods 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, \$2,500.00 in CDBG funds were used to provide targeted outreach to the CONA revitalization neighborhood. The intent was to improve the community's understanding of the City's CDBG rehabilitation programs and encourage greater participation by area residents. Additionally, in this area the City successfully completed the purchase and rehabilitation of one deed restricted affordable ownership unit. The unit is a 2-bedroom unit at 820 Casanova Avenue has been marketed and it is currently in escrow to be sold to a qualified Low-Income household. The sale should be completed prior to the end of December 2015.

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. In FY 2014/15 the City Council selected Mid-Peninsula The Farm, LLC to be the project developer. The City has executed an ENA and Pre-development Loan Agreement. The developer has received all required planning entitlements for the project and it has applied for HOME financing. At this time City staff and the developer are reviewing the draft Disposition and Development Agreement and lease form. No further agreements can be executed until the State completes its review of the HOME financing application and issues its decision. The City is also maintaining 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.

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

1. Administration

In FY 2014/15, \$250,632 in Housing Trust funds (former Redevelopment Agency housing funds) were expended to support program administration and planning activities. These administrative costs include costs related to personnel salaries and benefits, program supplies, professional contract services, and project costs related to pre-development activities for the Van Buren Street Senior Housing Project.

2. New Affordable Rental Projects

Housing Trust funds were used in FY 2014/15 to assist with two different new affordable rental projects. These projects are the Van Buren Street Senior Housing project and the Monterey Hotel apartment project. The Van Buren Street project was assisted with at \$195,000 Pre-development Loan that will be used to fund the developer's initial studies and planning efforts. Once final financing is secured the City's Pre-development Loan will be paid back. The Monterey Hotel apartment project will be completely funded with Housing Trust money. The City was able to successfully work with DOF to confirm that Housing Trust funds are properly obligated to the Monterey Hotel. These obligated funds will be used to complete the project.

During FY 2014/15, the City continued to work through challenges that have prevented completion of the Monterey Hotel affordable apartment project. FY 2014/15 staff prepared a RFP to solicit developer proposals to complete the apartments. In September 2015 (FY 2015/16) the Council selected a developer and negotiations are in process to execute all of the agreements that are needed to complete the construction. Agreements including ENA, Disposition and Development Agreement and lease form are anticipated to be executed in FY 2015/16 and construction to be completed prior to the end of FY 2016/17.

The City also spent \$179,034 in FY 2014/15 on the Monterey Hotel apartment project. These expenditures were related to construction management, interim repairs, City share of common area finishes and architectural services. They have been necessary to respond to weather damage and prepare documents necessary for the RFP. A total of \$1,200,000 in Housing Trust funds is obligated to assist the selected developer to complete the affordable apartments. In the event additional funding is needed to complete the apartments, the selected developer will be required to secure that funding. The City's strategy for completing the apartments requires the selected developer to enter into a long term lease and manage the apartments to be affordable to Very Low, Low and Median-Income households.

### **3. Purchase and Resale of Deed Restricted Affordable Ownership Units**

The City is able to maintain an inventory of deed restricted affordable ownership units in the community by exercising first right options to purchase when owners of these units wish to sell. SHA Housing Trust funds are one source of funds for these types of opportunity purchases. CDBG funds are another source of funds. Once the City completes the purchase of a deed restricted unit SHA Housing Trust funds or CDBG funds are used to cover the costs of needed repairs, utilities, taxes and homeowner association fees while the units are being prepared for resale. In FY 2014/15 a total of \$47,053.00 in Housing Trust funds were expended on repairs and maintenance of re-purchased deed restricted affordable ownership units.

## **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 rental income of \$9,947 in FY 2014/15 will be used to fund operational and replacement reserves. In FY 2014/15, improvements were completed on the security gates and balconies were repaired.

## **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 environment Low-Income and below renters face significant barriers in their search for affordable housing options as indicated below:

#### **1 High Rental Costs**

Census data indicates that rental unit pricing in the City of Monterey is generally affordable to Moderate-Income households earning up to 120% of County Median income. As income levels go

below Median to Low and Very Low-Income or below the adequacy of affordable rental units significantly declines. This conclusion is borne out in rental data provided by a local realtor in May 2015 which described average rents as

UNIT TYPE	AVERAGE RENT JULY 2015
Studio	\$900
1 BED	\$1,300
2 BED	\$1,487

Each of these rents exceeds recommended rents for income levels below 80% of Median County income (Low-Income). Additionally, low vacancy rates compound the rental housing issue. The historic vacancy rate in Monterey ranges between 0.5% and 1.5% and in the Program Year there were very few new rental units completed and occupied in the City. Consequently, rents remain high, supply is limited and available units are often unaffordable to extremely low, very low and low income households.

## 2 High Purchase Prices

The Monterey County Association of Realtors compiles data from the Multiple Listing Service about sales. The following data from 2010 to December 2014 shows that the average sales price for single family detached homes dropped through 2011 but then prices began to increase and these price increases continue. For units in common interest developments (condominiums), the average sales price also continued to increase in the most recent years. A detail of MCAR's data is as follows:

	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>Q2 2015</u>
<b><u>Single Family</u></b>					
Closed Sales	119	150	175	95	51
Average Days on Market	104	129	87	67	74
Average Sales Price	\$605,743	\$522,079	\$532,382	\$576,131	\$876,541
Median Sales Price	\$550,000	\$463,000	\$490,000	\$557,000	\$725,000
<b><u>Common Interest Dev.</u></b>					
Closed Sales	64	68	87	42	19
Average Days on Market	119	114	82	62	73
Average Sales Price	\$298,558	\$273,042	\$270,812	\$303,552	\$400,263
Median Sales Price	\$237,450	\$204,500	\$225,000	\$227,450	\$365,000

While the City's Purchase and Resale ownership program is intended to affirmatively further fair housing opportunities in the City it can only provide limited relief from high prices for a small

number of Low-Income households. Maintaining the program has also been especially challenging in the past few years, due to federal and state restrictions that limit use of City housing funds to Low-Income households only. As a consequence any opportunity purchase of a deed restricted Moderate-Income priced housing unit results in a net loss of funds because the purchased unit must be resold at a price affordable to Low-Income households.

### 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.
- High land costs that limit new development.
- All new development must be targeted to redevelopment of existing sites.
- Small lot areas that generally limit new development projects to a small number of units, which produces a challenge for affordable housing developers to gain below market rate financing.

### 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 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 this past Program Year the City completed the purchase of one ownership unit at 820 Casanova Avenue and executed a contract for real estate broker assistance to sell two units and potentially purchase three units through the City's Purchase and Resale Program. Each unit that is resold through this program will be permanently restricted to remain affordable as a Low-Income unit.



#### 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 the past Program Year these community services were only funded with CDBG grants. Former Redevelopment Agency housing funds are restricted to housing programs only and no longer available to fund community services grants.

#### Active Support to Develop New Extremely Low, Very Low, Low and Median-Income Housing Units

City staff is actively pursuing partnerships with affordable housing developers with objective to develop thirty-seven (37) new below market rent housing units. These units will be constructed in the Van Buren Senior Housing apartment project on City owned land in the 600 Block of Van Buren Street; and in the City owned portion of the Monterey Hotel at 406-410 Alvarado Street. In the past Program Year significant progress was made towards completing agreements with two different developers who will construct these new affordable housing units.

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

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

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.

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

In FY 2010/11, FY 2011/12 and in this past Program Year the City completed purchase of three affordable housing units. Additionally, after completing the purchase of the deed restricted Low-Income condominium unit in this past Program Year the unit was rehabilitated and now each of these units are ready for resale. All of these resale units will be priced to be affordable to eligible Low-Income households without need for down payment assistance. The successful purchase and resale of existing deed restricted ownership units implements the City's promotion of homeownership.

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

Very Low-Income homeowners often have difficulty in maintaining their property in a safe and habitable condition. For many years the City has utilized CDBG funds to provide low interest loans and grants to these Low-Income homeowners to assist them with needed repairs. The great majority of these loan and grant recipients are seniors or disabled homeowners with low or very low incomes.

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

One Major Rehabilitation loan was completed in the Program Year. The City also completed thirty one (31) home repair grants. These loans and grants were funded with CDBG money and they predominantly provided assistance to elderly and disabled owner residents that enabled them to complete needed repairs. These programs improve habitability of older homes and allow elderly and disabled owners to remain in the home.

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

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.

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

In the past Program Year, a total of 505 persons received service from various CDBG community services grant funded agencies that target services to those individuals experiencing homelessness or at risk of homelessness. Agencies providing these types of targeted services are Community Human Services, Shelter Outreach Plus, Interim, Inc., Salvation Army and YWCA.

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

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 the past Program Year the CONA area received the benefit of code compliance monitoring. The City's Code Compliance Coordinator is partially funded by CDBG and half of the Coordinators time is spent in neighborhoods that contain Census Tract Block Group concentrations of 43% (exception community) or more low-income households. The City's Census Tract 133, Block Groups 2, 3 and 4 each contain populations that exceed the 43% low-income threshold. In these Census Tract Block Groups the Coordinator works 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.

This CDBG funded Code Enforcement program investigated 109 cases in the designated low income neighborhoods to address blight and proactively identified code enforcement issues. Ninety-seven of the investigated cases were resolved.

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

CDBG-funded community services grants totaling \$118,053 were awarded to ten (10) non-profit agencies for eleven (11) separate activities in the Program Year. Together the funded agencies assisted a total of 1,440 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.

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

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.

In Program Year 12 City staff was successful in gaining State of California Department of Finance confirmation of affordable housing transfers to the City of Monterey. As a result of this success the City was able to receive program income from former Redevelopment Agency housing assets in this Program Year. These funds are used for administrative costs and opportunity purchase of deed restricted affordable housing units. Retention of former Redevelopment Agency housing assets has also allowed the City to pursue completion of the Monterey Hotel apartments as affordable housing units. Finally, staff continued to monitor property management of the Casa de la Estrella Apartments and work towards completion of development agreements for the Van Buren Senior Housing project.

- Action - 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. Continue to provide referrals to Alliance on Aging, Legal Services for Seniors, and The Salvation Army for persons/households at-risk of eviction, foreclosure or financial abuse.

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

Continue to provide residents with referrals to City-funded community service organizations, such as 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.

The charts that follow indicate the program title and beneficiary data, which correlates with particular HUD outcome and objective categories for CDBG-funded activities.

Additionally, the City made progress in addressing the Analysis of Impediments to Fair Housing findings, which were included in the FY 2010-2015 Five-Year Consolidated Plan. Though many of the identified impediments in the City's analysis involve the actions of the HACM because it is the agency that administers the County's Section 8 Housing Assistance Voucher program, the City has made progress in overcoming identified impediments to fair housing in the community. Specific actions taken in the past Program Year to address fair housing are:

- Support for community service grants;
- Maintenance of the Casa de Estrella apartments;
- Maintenance of the Purchase and Resale program for Low-Income home ownership; and
- Efforts to construct new below market rate apartments.

#### **CDBG FUNDS – PERFORMANCE MEASUREMENTS**

<b>Indicator</b>	<b>Outcome- Availability and accessibility</b>	<b>Outcome- Affordability</b>	<b>Outcome- Sustainability</b>
Suitable Living Environment	Community Services Grants 1440 Moderate-Income or below individuals	459 homeless were assisted with through outreach efforts, emergency shelter, mental health referrals or youth/family reunification	Neighborhood Revitalization - outreach and 109 code enforcement investigations - tract 133 – At least 89% of these code enforcement violations were resolved
Decent Housing	1 Major Rehabilitation loan was funded, 31 Housing Rehabilitation grants were approved	13 different properties were assisted to repair health and safety deficiencies	13 homes repaired

## HOUSING OUTCOMES – PERFORMANCE MEASUREMENTS

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

Outcome	Indicator	Program	Number Assisted
Decent Housing	Affordability	Down Payment Assistance	0
Decent Housing	Availability/Accessibility	Acquisition/ Rehabilitation/Resale to Low- Income Household	No sales completed, though City is in contract with Real Estate Broker to sell up to 3 units and opportunity purchase another 3 deed restricted units. Multiple sales and purchases are anticipated to be completed in FY 2015/16
Suitable Living Environment	Sustainability	Code Enforcement- Rehabilitation and CONA Activity	CDBG-109 low-income area targeted neighborhood health and safety clean-ups through code enforcement.
Decent Housing	Availability/Accessibility	Domestic Violence Shelter	46 women and children assisted under CDBG grant to YWCA for assistance in funding domestic violence shelter program
Suitable Living Environment	Sustainability	Homeless Youth Street Outreach and services	CDBG- 272 homeless and runaway youth assisted through outreach efforts
Suitable Living Environment	Affordability	New Rental Construction	With funding from former redevelopment agency housing funds-Staff continued work to complete 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). These funds were also used to provide a pre-development loan to assist development of the Van Buren Senior apartment project.
Decent Housing	Availability/Accessibility	Minor Rehabilitation	CDBG-31 grants to Low-Income individuals to assist in rehabilitation of 13 homes
Decent Housing	Availability/Accessibility	Accessibility Program	CDBG- 6 disabled low-income 31 disabled individuals assisted with warm water exercise therapy.
Decent Housing	Affordability	Acquisition Rehabilitation	CDBG- 1 2 to 4 units anticipated to be acquired in FY 2015/16
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 2010, the City of Monterey adopted a new 2010-2015 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 to 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, Interim Inc. and Salvation Army for additional emergency housing assistance. 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. Senior residents experiencing landlord/tenant disputes are referred to Legal Services for Seniors.

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 disabled 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 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 the past Program Year, 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 the past Program Year, a total of 505 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><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	\$9,456	272
<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	\$ 14,000	40
<b><u>Shelter Outreach Plus</u></b> - Operation of the revolving church emergency shelter for single males (I-HELP)	CDBG	\$ 7,875	51

<b>The Salvation Army</b> - Provides emergency Rental assistance to prevent eviction/homelessness, bus passes and medical care referrals	CDBG	\$7,857	50
<b>YWCA</b> – Emergency shelter for domestic abuse victims	CDBG	\$10,500	46

### 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>Alliance on Aging</b> - Senior Tax Assistance and Ombudsman.	CDBG	\$10,500	302 tax assistance 1658 Ombudsman	Yes
<b>Food Bank of Monterey County</b> - Food assistance to low-income seniors	CDBG	\$10,125	234	Yes
<b>Josephine Kerns Memorial Pool</b> –Providing warm water exercise and therapy to disabled	CDBG	\$8,100	31	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>Legal Services for Seniors</b> - Free legal assistance and representation for seniors	CDBG	\$7,312	241	Yes
<b>Meals on Wheels</b> - Home delivery of meals for frail elderly and disabled persons	CDBG	\$6,750	173	

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

### Monitoring and Reporting

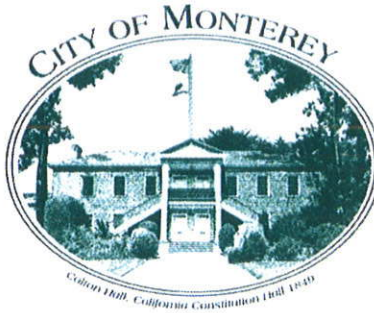
The City continuously monitors and works to improve performance in existing programs through implementation of approved strategies, goals and priorities. Staff of the Housing and Property Management Office is also continuously working to develop new programs as needs and opportunities are identified.

In the past Program Year a significant effort has been made to correct past deficiencies in program management that lead to a build-up of CDBG program income and a delay in spending the City's CDBG entitlement line of credit. Spending plans to correct these deficiencies were prepared and submitted to HUD for review and approval. HUD has approved the City's corrective spending plans and the approved plans will be implemented in FY 2015/16.

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**

<b>Goal</b>	<b>Activity</b>	<b>Outcome</b>
<b>I. Identify at least one housing project or program in collaboration with other agencies and/or key stakeholders</b>	<p>Continued negotiation on a land lease for 595 Munras Avenue the project will no longer contain 10 Low-Income affordable rental units because funding for the low-interest loan was lost with dissolution of former RDA. This project will go forward as a market rate mixed-use housing project.</p> <p>Continued work to develop new affordable apartments at Van Buren Street and Monterey Hotel.</p>	<p>Terms for land lease have been approved. Lease is in final stages.</p> <p>Exclusive negotiating agreement (ENA) executed for Van Buren project. Pre-development loan approved. Developer applied for HOME funding to finance the project. Disposition and development agreement and lease are to be negotiated.</p> <p>Developer selected to complete Monterey Hotel apartments. ENA recently approved.</p>
<b>II. Leverage previously awarded RDA funds for the Monterey Hotel Affordable Housing project.</b>	<p>1. 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.</p> <p>2. Staff continues to complete strategy for completing the affordable units.</p>	<p>1. Completed</p> <p>2. Ongoing</p>
<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>Code compliance coordinator continues to monitor area for code compliance violations. Blight and unsafe conditions.</p>	Ongoing
<b>IV. Apply for additional grants to support new City housing projects as they become ready to implement</b>	<p>City staff continues to research means to gain additional funds to assist development of new housing projects.</p>	Ongoing

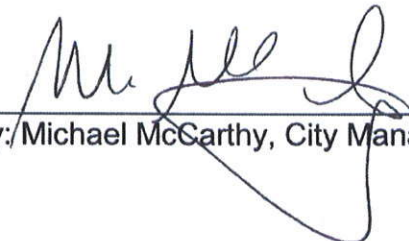


## CAPER CERTIFICATION STATEMENT

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

The 2014–2015 Program Year CAPER reports on the City of Monterey's progress in implementing activities and projects (measurable outcomes) reflected in the City's 2014-2015 Annual Action Plan. The 2014-2015 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

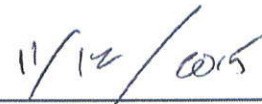
  
Date

EXHIBIT A

City of Monterey CAPER Fiscal Year 2014/15 Demographic Data - Clients Served																											
		Total # of Persons Assisted	White		Black/African Amer.		Asian		Amer. Ind./Alaskan Nat.		Nat. Haw./Other Pac. Is.		Asian & White		Black/African & White		Other		INCOME LEVELS								
			Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Extremely Low Income (30% AMT)	Low Income	Moderate Income	Non-Low Income	Single Female Head of Household			
HUD Acti vity No.	Program Name		Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Hispanic	Total	Extremely Low Income (30% AMT)	Low Income	Moderate Income	Non-Low Income	Single Female Head of Household			
479	Alliance on Aging	302	258	16	24	0	20	0	0	0	0	0	0	0	0	0	0	0	0	121	107	59	15	N/A			
480	Community Human Services	272	197	60	12	0	6	0	5	0	3	0	1	1	5	0	0	0	51	5	247	12	8	5	N/A		
483	Josephine Kerns Pool	31	24	4	3	0	0	0	1	0	0	0	0	1	0	0	0	0	2	2	13	9	3	6	N/A		
481	Food Bank	234	122	16	16	0	55	0	2	0	0	6	0	0	2	0	0	0	33	20	234	0	0	0	N/A		
484	Legal Services of Seniors	241	222	11	1	0	10	0	2	0	2	0	0	3	0	0	0	0	5	0	15	155	64	7	N/A		
485	Meals on Wheels	173	166	5	3	0	3	0	0	0	0	0	0	0	0	0	0	1	0	111	35	27	0	N/A			
486	The Salvation Army	50	43	13	5	0	1	0	1	0	0	0	0	0	0	0	0	0	0	27	19	4	0	N/A			
482	Interim, Inc	40	28	1	4	0	2	0	1	0	3	0	0	0	1	0	0	0	3	0	40	0	0	0	N/A		
488	YWCA	46	41	15	0	0	0	0	0	0	0	0	0	0	0	0	0	5	0	42	4	0	0	N/A			
487	Shelter Outreach Plus	51	47	5	0	0	4	0	0	0	0	0	0	0	0	0	0	0	0	48	3	0	0	N/A			
464	Purchase/Rehabilitation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	N/A			
465	Major Housing Rehab Loans	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	N/A			
466	Mr. Fix-It Grants	4	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3	1	0	0	0			
467	Home Safety Grants	5	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	1	0	0	0			
468	Accessibility Grants	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0			
	Total	1451	1159	146	68	0	101	0	12	0	8	0	7	0	5	1	8	0	0	100	27	905	347	166	33	1	

## EXHIBIT C. FAIR HOUSING ACCOMPLISHMENTS - PROGRAM YEAR 2014

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</p> <p>End of 2011</p>	<p>Completed and ongoing</p> <p>HRC did not apply for funding. City continues to refer individuals to HRC for referrals to First time Home Buyers classes, which are funded by buyers.</p> <p>Translation of notices to Spanish prepared in house.</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. All rehabilitation grants and loans include assessment for LBP if existing paint will be impacted by planned improvements. Projects are evaluated for compliance with 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 participants 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 for all of Program Year 14. Recently re-opened to re-establish waiting list.</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. Selected developer and executed ENA. Staff continued efforts to select developer to complete Monterey Hotel apartments as AH units
	<ul style="list-style-type: none"> <li>Continue provision of subsidies for production of AH</li> </ul>		Ongoing	Utilizing City owned land and/or housing funds to facilitate new AH.
	<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. One unit purchased and rehabilitated in Program Year 2014. Unit to be resold in Program Year 2015. Three other units in process to purchase. Two other units in escrow to sell in Program Year 2015. 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	Continue to review this issue with HACM.
	<ul style="list-style-type: none"> <li>Continue to monitor the Inclusionary Ord. for new development, subdivisions, condo. conversions.</li> </ul>		Ongoing	Inclusionary Ord. now only applies to ownership projects. Continually monitoring existing ownership units.

	<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> <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 permits</li> </ul>		Ongoing  Ongoing	Continue to review opportunities to expand Housing Voucher Program within the City. Van Buren Project has received commitment for Project based vouchers.
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 3 bedroom units</li> <li>• Under the inclusionary program, encourage developers to build 3+ bedroom units.</li> </ul>	Housing and Property Management	June 2013  Ongoing  Ongoing	<p>Incomplete. Limited number of 3-bedroom apartments available in community.</p> <p>Continue to review this issue with HACM.</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> <li>• Encourage condominium conversions to consolidate units to create 3+ bedroom units to accommodate larger households</li> <li>• Require a portion of 3+ bedroom units created in condo.</li> </ul>	<p>Planning Office</p> <p>Planning &amp; Housing and Property Management</p> <p>Housing and Property Management</p>	<p>June 2013</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Incomplete. Market changes have reduced incentive to convert apartments.</p> <p>Incomplete. Market changes have reduced incentive to convert apartments. Little demand for condominium conversions at this time. Significant demand for affordable rental units.</p> <p>Incomplete. No recent conversion</p>

	conversions to sell to inclusionary purchasers			applications.
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> <li>Continue to support and expand the Rapid Re-Housing Program for the Monterey Peninsula</li> <li>Investigate a site an emergency shelter for single women on the Monterey Peninsula</li> </ul>	Housing and Property Management	Ongoing	Participation in ongoing planning meetings
			2001-2012	Rapid Rehousing funds fully expended in 2012.
	<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 Gisnet Center for Conflict Management.

**PROGRAM YEAR 2014 SUMMARY OF CDBG ACTIVITIES AND PROJECTS**

Consolidated Plan Goals	Activity Name	Activity Description	Goal	Output
Housing Activities				
HS-2, HS-8, SP-3	Van Buren Senior Housing Site	City will complete RFQ process, select a developer & negotiate DDA to construct 19 LMI apartments.	Complete RFQ & DDA fund studies.	Developer selected. ENA and pre-development loan executed
HS-6, HS-7, SP-3	Major Rehabilitation Loans	Low-income, senior and disabled households; major rehabilitation	1-3 loans	1 loan provided
HS-5, HS-7	Purchase /Rehabilitation	Repair deed restricted affordable unit and prepare the unit for resale at price affordable to low-income household	2	1unit purchased and repaired for resale
HS-4, HS-7, SP-3	Mr. Fix It Grants	Repairs to assist seniors and disabled heads of households remain in their homes	10 grants	14 grants
HS-4, HS-7, SP-3	Home Safety Grants	Repairs to assist seniors and disabled heads of households remain in their homes	10 grants	11 grants
HS-4, HS-7, SP-3	Disabled Accessibility Grants	Assist with accessibility in the home	4 grants	6 grants
Project Delivery		Rehabilitation Program, Low-Income Purchase & Resale & loans		Technical support for loan & grants & repair of purchased unit
Public Services				
SP-3, CD-4	Alliance on Aging	Senior Tax Assistance and Ombudsman	Seniors served	302 seniors for tax assistance & 1658 facility visits
HA-1, HA-2, HA-5, SP-1	Community Human Services	Counseling, crisis intervention, and family reunification	Homeless youth assisted	272 homeless and runaway youth assisted
SP-1, SP-2, SP-3 CD-4	Food Bank of Monterey County	Food assistance to low-income seniors	Households served monthly ( seniors)	234 individuals assisted
HA-1, HA-2, HA-5, SP-1, SP-4	INTERIM Inc.	Outreach staff for homeless adults with mental illness	Homeless with psychiatric disabilities	40 individuals assisted
SP-1	Josephine Kerns Memorial Pool	Assistance to disabled	Pool activities and physical rehabilitation for very-low and low-income individuals	31 disabled individuals assisted
SP-1, SP-3 CD-4	Legal Services for Seniors	Free legal assistance and representation for seniors	Seniors assisted	241 seniors assisted
SP-1, SP-2, SP-3 CD-4	Meals on Wheels	Home delivery of meals for frail elderly and disabled persons	Homebound (majority seniors)served 5 days/week 2.5 meals/day	173 homebound individuals assisted

Consolidated Plan Goals	Activity Name	Activity Description	Goal	Output
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	Low-income households	50 individuals assisted
HA-1, HA-2, HA-3, HA-4, HA-5, SP-4	Shelter Outreach Plus	MOST Services – Outreach and supportive services for homeless individual	Assistance to homeless individuals	51 individuals assisted
SP-1	YWCA	Domestic Shelter for Women and children	Emergency shelter & supportive services to women suffering domestic abuse	46 assisted
<b>Casanova Oak Knoll Neighborhood Improvement District</b>				
CD-1, CD-2 HS-4, HS-7, SP-3	Neighborhood Activity	Outreach to neighborhood for housing rehabilitation grants and services	Assist low-income and elderly remain in their homes	Information flyers distributed
CD-1, CD-2	Code Enforcement	Code enforcement in low-income block groups and focus on CONA NID	Code investigations and resolved	109 code, blight or safety investigations
<b>Accessible Sidewalks Low-Income Areas</b>				
CD-1, CD-3, CD-5	Neighborhood Activity to improve access for elderly and disabled	Construct four curb ramps in 200 and 300 blocks of Van Buren Street	Assist frail elderly, elderly & disabled in predominantly low-income area	Design initiated & environmental review completed
<b>Rebuild Housing Reserve (Purchase &amp; Resale)</b>				
HS-3, HS-5	Housing Projects – Reserve to fund opportunity purchases	Reserve to fund opportunity purchases	Assist 1 <sup>st</sup> time homebuyers	Intent to utilize funds from resale of units for opportunity purchase of additional units.
<b>Planning and Administration</b>				
AP-1, AP-2	Planning and Administration	Provide general administration of the CDBG program, including all planning and reporting activities	1 year of program administration	Staff assistance to all housing programs, prepared & received HUD approval of Substantial Amendment and timeliness spending plan. Prepared new 5-Year Consolidated Plan.





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**PART I: SUMMARY OF CDBG RESOURCES**

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	1,252,509.00
02 ENTITLEMENT GRANT	183,890.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	535,043.36
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	1,971,442.36

**PART II: SUMMARY OF CDBG EXPENDITURES**

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	710,122.10
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	710,122.10
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	155,704.15
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	865,826.25
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,105,616.11

**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	489,150.00
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	489,150.00
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	68.88%

**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	118,053.50
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	118,053.50
32 ENTITLEMENT GRANT	183,890.00
33 PRIOR YEAR PROGRAM INCOME	400,000.00
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	583,890.00
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	20.22%

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

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	155,704.15
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 + LINE 40)	155,704.15
42 ENTITLEMENT GRANT	183,890.00
43 CURRENT YEAR PROGRAM INCOME	535,043.36
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	718,933.36
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	21.66%



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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Target Area Type	Drawn Amount
2014	14	491	5777597	Major Rehabilitation-Loans	14A	LMH	Strategy area	\$90,000.00
					<b>14A</b>	<b>Matrix Code</b>		<b>\$90,000.00</b>
<b>Total</b>								<b>\$90,000.00</b>

**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
2014	23	502	5822112	Corner Ramp Sidewalks Project	03L	LMA	\$3,572.50
					<b>03L</b>	<b>Matrix Code</b>	<b>\$3,572.50</b>
2013	5	459	5716486	INTERIM Inc.	03T	LMC	\$1,250.00
2014	5	482	5745311	INTERIM, Inc	03T	LMC	\$4,183.80
2014	5	482	5775300	INTERIM, Inc	03T	LMC	\$5,632.40
2014	5	482	5776827	INTERIM, Inc	03T	LMC	\$1,262.69
2014	5	482	5808256	INTERIM, Inc	03T	LMC	\$2,921.11
2014	11	487	5808256	Shelter Outreach Plus	03T	LMC	\$7,875.00
					<b>03T</b>	<b>Matrix Code</b>	<b>\$23,125.00</b>
2013	2	456	5716486	Alliance on Aging	05A	LMC	\$2,500.00
2013	6	460	5716486	Legal Services for Seniors	05A	LMC	\$3,750.00
2013	7	461	5716486	Meals on Wheels	05A	LMC	\$2,500.00
2014	9	479	5745311	Alliance on Aging CS (2014)	05A	LMC	\$2,500.00
2014	9	479	5775262	Alliance on Aging CS (2014)	05A	LMC	\$3,482.00
2014	9	479	5808256	Alliance on Aging CS (2014)	05A	LMC	\$4,518.00
					<b>05A</b>	<b>Matrix Code</b>	<b>\$19,250.00</b>
2014	10	483	5745311	Josephine Kern's Memorial Pool	05B	LMC	\$2,700.00
2014	10	483	5775262	Josephine Kern's Memorial Pool	05B	LMC	\$2,700.00
2014	10	483	5808256	Josephine Kern's Memorial Pool	05B	LMC	\$2,700.00
					<b>05B</b>	<b>Matrix Code</b>	<b>\$8,100.00</b>
2014	6	484	5745311	Legal Services for Seniors	05C	LMC	\$2,437.50
2014	6	484	5775262	Legal Services for Seniors	05C	LMC	\$2,437.50
2014	6	484	5808256	Legal Services for Seniors	05C	LMC	\$2,437.50
					<b>05C</b>	<b>Matrix Code</b>	<b>\$7,312.50</b>
2013	3	457	5716486	Community Human Services	05D	LMC	\$250.00
2014	3	480	5745311	Community Human Services	05D	LMC	\$2,992.00
2014	3	480	5775262	Community Human Services	05D	LMC	\$2,779.00
2014	3	480	5808256	Community Human Services	05D	LMC	\$3,665.00
					<b>05D</b>	<b>Matrix Code</b>	<b>\$9,686.00</b>
2014	12	488	5745311	YWCA of Monterey County	05G	LMC	\$3,500.00
2014	12	488	5775262	YWCA of Monterey County	05G	LMC	\$3,500.00
2014	12	488	5808256	YWCA of Monterey County	05G	LMC	\$3,500.00
					<b>05G</b>	<b>Matrix Code</b>	<b>\$10,500.00</b>
2013	8	462	5716486	Salvation Army	05Q	LMC	\$2,500.00
2014	8	486	5745311	Salvation Army	05Q	LMC	\$3,333.00
2014	8	486	5775262	Salvation Army	05Q	LMC	\$7,486.00
2014	8	486	5808256	Salvation Army	05Q	LMC	\$5,657.00
					<b>05Q</b>	<b>Matrix Code</b>	<b>\$18,976.00</b>
2013	4	458	5716486	Food Bank	05W	LMC	\$3,750.00
2014	4	481	5745311	Food Bank of Monterey County	05W	LMC	\$3,375.00
2014	4	481	5775262	Food Bank of Monterey County	05W	LMC	\$3,375.00
2014	4	481	5808256	Food Bank of Monterey County	05W	LMC	\$3,375.00





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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	15	492	5777597	Mr. Fixit Grants	05W	Matrix Code	\$13,875.00
2014	16	493	5777597	Home Safety Grants	14A	LMH	\$35,000.00
2014	17	494	5777597	Home Accessibility Grant (HAG)-Disabled	14A	LMH	\$35,000.00
2013	10	464	5725872	Purchase/Rehabilitation - Ownership	14A	Matrix Code	\$105,000.00
2012	28	448	5723093	Project Delivery	14G	LMH	\$124,370.00
2012	27	447	5725772	Historic Preservation	14G	Matrix Code	\$124,370.00
					14H	LMH	\$125,483.00
					14H	Matrix Code	\$125,483.00
					16B	LMA	\$19,900.00
					16B	Matrix Code	\$19,900.00
<b>Total</b>							<b>\$489,150.00</b>

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	5	459	5716486	INTERIM Inc.	03T	LMC	\$1,250.00
2014	5	482	5745311	INTERIM, Inc	03T	LMC	\$4,183.80
2014	5	482	5775300	INTERIM, Inc	03T	LMC	\$5,632.40
2014	5	482	5776827	INTERIM, Inc	03T	LMC	\$1,262.69
2014	5	482	5808256	INTERIM, Inc	03T	LMC	\$2,921.11
2014	11	487	5808256	Shelter Outreach Plus	03T	LMC	\$7,875.00
					03T	Matrix Code	\$23,125.00
2012	25	445	5723144	CONA-Neighborhood Revitalization	05	LMA	\$479.00
					05	Matrix Code	\$479.00
2013	2	456	5716486	Alliance on Aging	05A	LMC	\$2,500.00
2013	6	460	5716486	Legal Services for Seniors	05A	LMC	\$3,750.00
2013	7	461	5716486	Meals on Wheels	05A	LMC	\$2,500.00
2014	7	485	5745311	Meals on Wheels	05A	LMC	\$2,250.00
2014	7	485	5775262	Meals on Wheels	05A	LMC	\$2,250.00
2014	7	485	5808256	Meals on Wheels	05A	LMC	\$2,250.00
2014	9	479	5745311	Alliance on Aging CS (2014)	05A	LMC	\$2,500.00
2014	9	479	5775262	Alliance on Aging CS (2014)	05A	LMC	\$3,482.00
2014	9	479	5808256	Alliance on Aging CS (2014)	05A	LMC	\$4,518.00
					05A	Matrix Code	\$26,000.00
2014	10	483	5745311	Josephine Kern's Memorial Pool	05B	LMC	\$2,700.00
2014	10	483	5775262	Josephine Kern's Memorial Pool	05B	LMC	\$2,700.00
2014	10	483	5808256	Josephine Kern's Memorial Pool	05B	LMC	\$2,700.00
					05B	Matrix Code	\$8,100.00
2014	6	484	5745311	Legal Services for Seniors	05C	LMC	\$2,437.50
2014	6	484	5775262	Legal Services for Seniors	05C	LMC	\$2,437.50
2014	6	484	5808256	Legal Services for Seniors	05C	LMC	\$2,437.50
					05C	Matrix Code	\$7,312.50
2013	3	457	5716486	Community Human Services	05D	LMC	\$250.00
2014	3	480	5745311	Community Human Services	05D	LMC	\$2,992.00
2014	3	480	5775262	Community Human Services	05D	LMC	\$2,779.00
2014	3	480	5808256	Community Human Services	05D	LMC	\$3,665.00
					05D	Matrix Code	\$9,686.00
2014	12	488	5745311	YWCA of Monterey County	05G	LMC	\$3,500.00
2014	12	488	5775262	YWCA of Monterey County	05G	LMC	\$3,500.00
2014	12	488	5808256	YWCA of Monterey County	05G	LMC	\$3,500.00
					05G	Matrix Code	\$10,500.00
2013	8	462	5716486	Salvation Army	05Q	LMC	\$2,500.00
2014	8	486	5745311	Salvation Army	05Q	LMC	\$3,333.00





## House

FROM PAGE 1

the exterior of the building that prompted the popular name (it's also known as the Allan House) occurred after Allan moved out.

But none of that has stopped a rising hue and cry against plans to relocate the historically significant structure to the dust bin of history.

Point Lobos Foundation board president Angie Louis, who is married to Allan's great-granddaughter Holly Hudson-Louis and lives nearby, said replacing the Stone House with large homes would represent a major loss to the area, given Allan's legacy and the impact on the scenic Highway 1 views.

Louis, who stressed he was not speaking for the foundation board and said it had yet to formally discuss the issue, noted that Allan played a key part in the preservation of Point Lobos by purchasing hundreds of acres of the world-famous Monterey cypress-covered rocky headlands, including lots on the planned Carmelitos subdivision.

Allan and his family initially fought state and local efforts to acquire the property as public parkland, according to a historic assessment prepared for the development proposal that found the Stone House "historically significant" but questioned its eligibility for historic listing. But after Allan's death, his family sold 348 acres to the California State Parks Commission, and dedicated an-



Story poles stick up around the Stone House on Riley Road across Highway 1 from Point Lobos in Carmel.

other 15 acres to the state for a memorial to Allan and his wife, Sattie.

"He was one of the earliest preservationists in the state of California," Louis said. "This was an extraordinary undertaking in that era. (The Stone House) is in need of repair. Not an 1870s structure sounds pretty historic to me and tearing down a historic building and replacing it with (large) homes will make a huge difference to the view from a scenic highway."

"There's hardly anything of greater historic value in the area," Louis said. "According to Monterey County assistant planner Dan Lister, the bid by Richard and Daryl Larsen of the Larsen 2007 Trust to demolish the old house and another structure on site, and erect a couple of homes — 6,321 square feet and 2,990 square feet in size — and convert an existing barn has prompted 'many calls' about the proposal."

Lister said he expects a group of people to show up in support of the Stone House at Monday's Carmel Unincorporated/Highlands

Land Use Advisory Committee meeting, which includes a discussion of the Larsen's proposal.

The meeting is set for 4 p.m. at the Carmel Highlands Fire Protection District headquarters, 73 Fern Canyon Road, Carmel. Lister said the Larsen's application, submitted about three weeks ago, remains incomplete, mostly because the historic assessment prepared by Santa Cruz-based historian Anthony Kirk needs to be revised to address whether the house meets state and local criteria for listing on historic registries. The assessment only addressed national standards.

Kirk's assessment found that the Stone House had retained its original location and the setting is similar to when Allan lived there. But he also noted that the house's design had been "radically altered" as a result of renovations over the years, leaving only most of the windows and what can be seen of the exterior chimney. The changes had led to a "loss of integrity" for the property that made it, in his view, ineligible for

listing on the state register of historical resources.

Lister said there are other development application issues that need to be completed, but the historic assessment is key.

"The main issue at this point is the building's historic nature," Lister said. When the revision is done, county cultural affairs manager Meg Clovis said the county's Historic Resources Review Board would consider the Stone House's historic significance at its regular meeting in November or December.

According to Kirk's report, Allan arrived on the Monterey Peninsula about 1895 when he was recruited to reorganize a Malpais Canyon coal mine and help develop the Carmelitos subdivision owned by the Carmel Land and Coal Co.

By 1898, Allan had acquired the nearly bankrupt company, including 660 acres of land that included Point Lobos. That same year, he formed a partnership with Genesee Kodani to create the Point Lobos Canning Co. to farm abalone, and at the height of its success the company controlled 75 percent to 80 percent of the state's market for abalone steaks.

At one point, Allan had acquired about 2,400 acres, running from the Carmel River to Gibson's Creek, including Point Lobos and the entirety of the Carmelitos subdivision, whose map he had stricken from county records to prevent its development, according to Louis.

Jim Johnson can be reached at 726-4348.

## POLICE BRIEFS

# Man dies in King City shooting

By Herald staff

A man was shot multiple times late Wednesday in King City and later died from his wounds, King City police said.

Officers responded to reports of a shooting in the 500 block of Bassett Street and found George Chavez, 44, suffering from multiple gunshot wounds.

Chavez was transported to a local hospital for treatment, where he died from his injuries Thursday while in surgery.

Anyone with information regarding the shooting is encouraged to call the King City Police Department at 831-386-3880 or the WeTip line at 1-800-78-CRIME to remain anonymous.

## Marina

**ABANDONED VEHICLE SUSPICIOUS** A vehicle parked on Imjin Parkway was found with a broken back window and blood and hair inside Friday morning, and the Marina police are trying to figure out what happened.

The black Mitsubishi Montero SUV was supposedly left by the driver when it broke down on the thoroughfare, but that person reported the vehicle had no rear window damage when it was abandoned where officers found it.

Investigators theorize that a bicyclist may have

crashed into the vehicle because the area is dark at night and the person may not have seen the black SUV parked on the road until it was struck. Damage on the vehicle is consistent with this theory, and the police are seeking the person to assess their condition and further investigate what took place.

Anyone involved in an unreported bicycle crash on Thursday night or has any other information on this incident is asked to contact the Marina Police Department at 831-384-7575.

## Pacific Grove

**POLICE WARN OF SCAMMERS** Police are urging the public to be cautious with solicitors and ask to see their permits after a report of fraudulent solicitation.

A man who claimed to be working on behalf of Care Package Campaign requested donations for service members, but the resident looked up the company name and found out it was fraudulent.

Everyone soliciting in Pacific Grove on behalf of any company must be fully licensed by the driver when they can only conduct business during the hours between sunrise and sunset, police said.

The Pacific Grove Police Department requests that residents report any suspicious activity to police.

## Flood

FROM PAGE 1

Flores said she, her mother and her stepfather were driving back to Bakersfield from her sister's funeral in Utah when it began to rain out of nowhere.

"It started raining, and it kept raining, the water started to build up and the mud started coming," Flores said from the church where she, her family and about 150 other people sheltered overnight. "The water's about 200 cars and some rushing by, the mud's rushing by, then pieces of trees started coming by and the water was past our doors."

Flores said the trio was prepared to jump out of the windows if the water got any higher. Luckily, it subsided.

"I'm feeling blessed that we are here," she said.

Sgt. Mario Lopez, a spokesman for the California Highway Patrol, was at the scene as people were being rescued and

said it was sheer chaos. "I've never seen anything like this before," Lopez said. "The whole side of the hill just came down onto State Route 58 ... There's no highway."

The storm unleashed flash flood and debris flows along the 58, the Interstate 5 and in two small mountain communities, where at least a dozen homes were reported damaged.

Lopez said it will take days to reopen State Route 58, a mile of which is choked with mud between 2 and 6 feet deep. About 200 cars and some trucks were trapped in the now-hardened mud, frozen in place at odd angles.

Hundreds of semis were backed up for 10 miles on the freeway at one point Friday because of the closure. Lopez said they would likely eventually be turned around.

Emergency crews were working to dig out head-high mounds of mud from the 58 and Interstate 5, which was also shut down as hundreds of cars were trapped in the mud Thursday.

## STEAM

FROM PAGE 1

of warning because I've seen it happen a lot today. Your hydraulics are fragile. Be careful with them. The tubing, if it's not pushed in there nice and tight, it's going to come off, it's going to make a mess and you're going to have to start over. I don't want that today."

The concept of Science, Technology, Engineering and Math, STEM, as a goal worth pursuing has been around for so long that it seems pretty much ingrained in the education conversation. At Monterey Peninsula Unified, all high schools have at least one STEM class — be it computer science or biotechnology — and all three middle schools have STEM electives.

But the idea that STEM needs to have "art" attached to it — as in STEAM — is more recent, and it's being fueled by a movement to increase arts in the schools and in education as a whole.

"The support for STEM shows if there is a connection between an educational need and the future US economy, there is willingness and freedom to consider funding such programs," technology entrepreneur Harvey White wrote in a white paper published in 2010. "Creating STEAM by including Arts with a STEM curriculum is such a program because it is critical to the overall educational preparation of our future leaders and will greatly help assure our future economy by providing the best possible education for innovation. It clearly makes sense to do both Arts and STEAM — i.e., STEAM."

Art "is inherently in" STEM, Wormley said. "It's in architecture — you don't have ugly buildings. My course description says STEAM but I told the kids the first day of class it's a course on STEAM."

Wormley's class, also an elective, is believed to be the first STEAM class at MPSUD, and the concept is so new there's no curriculum that can guide her, so she's making lessons as she goes.

"It's problem-based learning," she said. "There's a lot of projects out there, and as long as I incorporate any of the subjects it can go. Most of them have a lot of the concepts."

For the hydraulics judo-robots, students had to learn about math and physics — their bases can't be bigger than 10 inches by 10 inches, and if the arms are too heavy they're going to collapse. The arms are operated by syringes with water inside, a hydraulic principle.

"We use (hydraulics) in cars, in airplanes, in pumps," said Deas. "The smaller the hole, the bigger the pressure."

Deas, 13, is no stranger to projects, he said. In his uncle's workshop he's allowed to play with wood and bricks to come up with "stuff like this," he said.

But what he's learning from Wormley's class is to have a partner.

"I usually do things alone; here we have to work together," he said.

The new Content Standards — as the Common Core Standards have been renamed — emphasize working together to solve problems, another feature of Wormley's class that's

compatible with new educational trends. Students "are way happier to be in STEAM," she said. "I make my math as much fun as I can but we have so many standards, I don't have as much freedom. This class I ask them, what do you want to do? Let's do it. They want the buy in, I can't do that in math. They have buy in, they have choices. They got the supplies. All supplies for this were bought from parents or gift cards I was given at Michaels; a parent bought things from Amazon. This project fully supported by parents, which is huge."

Next week, the students will have a chance to battle their bots in front of their entire school. If they tested their rudimentary robots on Friday, they clearly demonstrated they don't need the audience to have a blast.

To support Carlyn Wormley's STEAM class financially, visit [www.Gofundme.com/wcmSTEAM](http://www.Gofundme.com/wcmSTEAM)

Clonidia Meléndez Salinas can be reached at 726-4370.

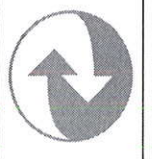
## Toxins

FROM PAGE 2

Researchers and the city are treating the lake with an environmentally safe polymer, such as aluminum, and managing the watershed in a way that addresses nutrient sources. The lake is part of a \$750,000 state grant.

"They've also recently removed 3,300 pounds of non-native carp, which contribute to the toxic algal problem, and completed a state-funded study in 2013 that identified nutrients, particularly phosphorus, as the drivers of Pinto Lake's cyanobacteria blooms.

**PLEASE RECYCLE THIS NEWSPAPER.**



Thank you!

## \*\*\* 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, 2014 through June 30, 2015. 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 2010-2015 Consolidated Plan for Housing Programs.

This draft Report will be available for review beginning October 19, 2015 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 October 27, 2015 at 4:00 p.m. in the City Council Chambers, 500 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 Richard S. Marvin, Housing and Property Manager, City of Monterey, City Hall, Monterey, CA 93940.

(b) 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 toll-free speech, speech-to-print, 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) 646-3935.

Publication date: September 17, 2015.



## \*\*\* NOTIFICACIÓN \*\*\* AUDIENCIA PÚBLICA DE PROGRAMAS DE VIVIENDA Y DISPONIBILIDAD DE REPORTES PRELIMINARES

Informe Consolidado de Desempeño y Análisis de Evaluación (Consolidated Annual Performance and Evaluation Report) CAPER, con sus datos en inglés y español. Tablas de Desempeño y Logros de los Programas de Vivienda y la Comunidad (Community Development Block Grant, (CDBG), por sus siglas en inglés) y Fichas de Seguimiento de Vivienda.

La Ciudad de Monterey ha preparado su Informe Desempeño Anual y de Vivienda para el periodo de 1 de julio 2014 hasta e incluyendo el 30 de junio 2015. 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 medios.
2. Los informes narrativos que comparan la relación de las necesidades de la comunidad y el uso de los fondos a los objetivos en 2010-2015 Plan Consolidado de la Ciudad para programas de vivienda.

Este proyecto de informe estará disponible para su revisión a partir de 19 de octubre 2015 en la Biblioteca Pública de Monterey la Oficina del Secretario de la Ciudad, Oficina de Vivienda y Gestión de la propiedad, y la Oficina de Planificación durante el horario normal.

La Comisión de Planificación de la Ciudad de Monterey llevará a cabo una Audiencia Pública el 27 de octubre, 2015 a las 4:00 pm en Council Chambers, 500 Memorial Hall, esquina de las calles Madison y Pacific, Monterey. El propósito de esta audiencia es revisar los informes, tomar las consideraciones del público y recomendar la presentación CAPER al Departamento de Vivienda y Desarrollo Urbano (HUD). Los ciudadanos pueden asistir a la audiencia en público para proporcionar información o traer las comentarios por escrito a Richard S. Marvin, los directores y el Administrador de la Ciudad de Monterey al Departamento de Vivienda y Desarrollo Urbano al (831) 646-3935.

(b) La Ciudad de Monterey está comprometida a incluir a 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 la Ciudad (CRS) por sus siglas en inglés para comunicarse con las oficinas de la Ciudad. CRS ofrece gratis, texto-voz, voz-texto, en español servicios en español 24 horas al día, los siete días de la semana. Si usted requiere una herramienta de amplificación de audición para asistir a la junta, marque 711 para utilizar el Servicio de Relato de la Ciudad del Secretario Municipal al (831) 646-3935 y para acceso al uso del sistema de amplificación o 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 (HUD), por sus siglas en inglés de la Ciudad, comuníquese con la Oficina de Vivienda y Administración de Propiedad Remonta al (831) 646-3935.

Fecha de publicación: 17 de octubre, 2015.

U.S. DEPARTMENT OF HOUSING AND  
URBAN DEVELOPMENT  
OFFICE OF COMMUNITY PLANNING AND  
DEVELOPMENT

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PR06 - Summary of Consolidated Plan  
Projects for Report Year

IDIS

Plan IDIS Year Project	Project Title and Description		Program
2014 1	Purchase and Rehabilitation-Ownership	Purchase homes that are rehabilitated and converted to ownership or lease to own program.	CDBG
2	Planning/Administration	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.	CDBG
3	Community Human Services	Youth Services-provide services to homeless run-away youth and to intervene in the homeless cycle	CDBG
4	Food Bank	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.	CDBG
5	INTERIM Inc.	Provide emergency and temporary housing outreach and case management services for mentally ill single adults the the MCHome program	CDBG
6	Legal Services for Seniors-CS	Provide outreach, education, legal advocacy, information & referral, public benefit advocacy, elder abuse prevention, consumer fraud prevention,for elderly citizens.	CDBG
7	Meals on Wheels	Meal Delivery to homebound seniors and disabled individuals	CDBG
8	Salvation Army	Emergency Rental Assistance and homeless prevention services to persons at risk of homelessness from permanent residence.	CDBG
9	Alliance on Aging -CS	Elderly Services-provide tax assistance and access to Ombudsman Program	CDBG
10	Josephine Kerns Memorial Pool-CS	continuance of the provision and expansion of warm water exercise programs for low income persons with physical and/or developmental disabilities.	CDBG
11	Shelter Outreach Plus	Provide supportive sevicees as an emergency shelter for men as part of a continuum care	CDBG
12	YWCA-Monterey County	Provision of emergency shelter and counseling servcies for women and children fleeing domestic violenc and at risk of homelessness due to domestic violence.	CDBG
13	Purchase and Rehabilitation-Ownership	Purchase homes that are rehabilitated and converted to ownership	CDBG
14	Major Rehabilitation Loans	Major Rehabilitaion projects for low-income senior or disabled individuals to ensure property is brought up to Housing Quality standards or local building codes.	CDBG
15	Mr. Fixit Grants	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.	CDBG
16	Home Safety Grants	Provide small grants to low income seniors and disabled heads of households for home safety repairs to meet Health and Safety Quality Standards.	CDBG
17	Home Accessibility Grants-Disabled Accessibility	Provide small grants to low income seniors and disabled heads of households for home safety repairs to meet Health and Safety Quality Standards.	CDBG
18	Project Delivery-Housing	Administer Housing activities in compliance with the regulations of local policies.	CDBG

U.S. DEPARTMENT OF HOUSING AND  
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IDIS

Project Estimate	Committed Amount	Amount Drawn Thru Report Year	Amount Available to Draw	Amount Drawn in Report Year
\$190,000.00	\$0.00	\$0.00	\$0.00	\$0.00
\$147,564.00	\$137,564.00	\$0.00	\$137,564.00	\$0.00
\$10,500.00	\$10,500.00	\$9,436.00	\$1,064.00	\$9,436.00
\$13,500.00	\$13,500.00	\$10,125.00	\$3,375.00	\$10,125.00
\$14,000.00	\$14,000.00	\$14,000.00	\$0.00	\$14,000.00
\$9,750.00	\$9,750.00	\$7,312.50	\$2,437.50	\$7,312.50
\$9,000.00	\$13,500.00	\$6,750.00	\$6,750.00	\$6,750.00
\$24,500.00	\$24,500.00	\$16,476.00	\$8,024.00	\$16,476.00
\$13,000.00	\$13,000.00	\$10,500.00	\$2,500.00	\$10,500.00
\$10,800.00	\$10,800.00	\$8,100.00	\$2,700.00	\$8,100.00
\$10,500.00	\$10,500.00	\$7,875.00	\$2,625.00	\$7,875.00
\$10,500.00	\$10,500.00	\$10,500.00	\$0.00	\$10,500.00
\$190,000.00	\$0.00	\$0.00	\$0.00	\$0.00
\$90,000.00	\$90,000.00	\$90,000.00	\$0.00	\$90,000.00
\$35,000.00	\$35,000.00	\$35,000.00	\$0.00	\$35,000.00
\$35,000.00	\$35,000.00	\$35,000.00	\$0.00	\$35,000.00
\$35,000.00	\$35,000.00	\$35,000.00	\$0.00	\$35,000.00
\$35,000.00	\$78,471.00	\$0.00	\$78,471.00	\$0.00

U.S. DEPARTMENT OF HOUSING AND  
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IDIS

Plan IDIS Year Project	Project Title and Description	Program
2014 19	Code Enforcement	Code enforcement in low income block groups, including focus on Casanova Oak Knoll Neighborhood Improvemtn District and neighboring areas. CDBG
20	Outreach Rehabilitation grants-CONA	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. CDBG
21	Rebuild Housing Reserve (Purchase and Resale)	Rebuild Housing Reserve (Purchase and Resale) to fund opportunity purchases to Assist 1st time homebuyers CDBG
22	Corner Sidewalks Projects	Construct four curb ramps in 200 and 300 blocks of Van Buren Street CDBG
23	Corner Ramp Sidewalks Project	Construct four curb ramps in 200 and 300 blocks of Van Buren and Scott Street-Neighborhood Activity to improve access for elderly and disabled CDBG
24	Van Buren Housing - Technical Studies	CDBG



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IDIS

Project Estimate	Committed Amount	Amount Drawn Thru Report Year	Amount Available to Draw	Amount Drawn in Report Year
\$60,554.00	\$60,554.00	\$42,117.10	\$18,436.90	\$42,117.10
\$2,500.00	\$2,500.00	\$862.15	\$1,637.85	\$862.15
\$277,747.00	\$0.00	\$0.00	\$0.00	\$0.00
\$49,500.00	\$0.00	\$0.00	\$0.00	\$0.00
\$49,500.00	\$49,500.00	\$3,572.50	\$45,927.50	\$3,572.50
\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00



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

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

Activity Group	Activity Category	Open Count	Open Activities Disbursed	Completed Count	Completed Activities Disbursed	Program Year Count	Total Activities Disbursed
Housing	Rehab; Single-Unit Residential (14A)	5	\$195,000.00	5	\$0.00	10	\$195,000.00
	Acquisition for Rehabilitation (14G)	0	\$0.00	3	\$124,370.00	3	\$124,370.00
	Rehabilitation Administration (14H)	1	\$0.00	2	\$125,483.00	3	\$125,483.00
	Code Enforcement (15)	1	\$42,117.10	3	\$14,626.00	4	\$56,743.10
	<b>Total Housing</b>	<b>7</b>	<b>\$237,117.10</b>	<b>13</b>	<b>\$264,479.00</b>	<b>20</b>	<b>\$501,596.10</b>
Public Facilities and Improvements	Sidewalks (03L)	1	\$3,572.50	1	\$67,000.00	2	\$70,572.50
	Non-Residential Historic Preservation (16B)	0	\$0.00	2	\$19,900.00	2	\$19,900.00
	<b>Total Public Facilities and Improvements</b>	<b>1</b>	<b>\$3,572.50</b>	<b>3</b>	<b>\$86,900.00</b>	<b>4</b>	<b>\$90,472.50</b>
Public Services	Operating Costs of Homeless/AIDS Patients Programs (03T)	2	\$21,875.00	2	\$1,250.00	4	\$23,125.00
	Public Services (General) (05)	0	\$0.00	1	\$479.00	1	\$479.00
	Senior Services (05A)	2	\$17,250.00	3	\$8,750.00	5	\$26,000.00
	Handicapped Services (05B)	1	\$8,100.00	0	\$0.00	1	\$8,100.00
	Legal Services (05C)	1	\$7,312.50	0	\$0.00	1	\$7,312.50
	Youth Services (05D)	1	\$9,436.00	1	\$250.00	2	\$9,686.00
	Battered and Abused Spouses (05G)	1	\$10,500.00	0	\$0.00	1	\$10,500.00
	Subsistence Payment (05Q)	1	\$16,476.00	1	\$2,500.00	2	\$18,976.00
	Food Banks (05W)	1	\$10,125.00	1	\$3,750.00	2	\$13,875.00
	<b>Total Public Services</b>	<b>10</b>	<b>\$101,074.50</b>	<b>9</b>	<b>\$16,979.00</b>	<b>19</b>	<b>\$118,053.50</b>
General Administration and Planning	General Program Administration (21A)	1	\$0.00	2	\$150,718.00	3	\$150,718.00
	Public Information (21C)	1	\$862.15	1	\$4,124.00	2	\$4,986.15
	<b>Total General Administration and Planning</b>	<b>2</b>	<b>\$862.15</b>	<b>3</b>	<b>\$154,842.00</b>	<b>5</b>	<b>\$155,704.15</b>
Other	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>21</b>	<b>\$342,626.25</b>	<b>28</b>	<b>\$523,200.00</b>	<b>49</b>	<b>\$865,826.25</b>



U.S. Department of Housing and Urban Development  
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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	31	29	60
	Acquisition for Rehabilitation (14G)	Housing Units	0	5	5
	Rehabilitation Administration (14H)	Housing Units	8	10	18
	Code Enforcement (15)	Persons	2,935	10,445	13,380
		Housing Units	0	6,006	6,006
<b>Total Housing</b>			<b>2,974</b>	<b>16,495</b>	<b>19,469</b>
Public Facilities and Improvements	Sidewalks (03L)	Persons	575	6,085	6,660
	Non-Residential Historic Preservation (16B)	Business	0	566	566
<b>Total Public Facilities and Improvements</b>			<b>575</b>	<b>6,651</b>	<b>7,226</b>
Public Services	Operating Costs of Homeless/AIDS Patients Programs (03T)	Persons	91	289	380
	Public Services (General) (05)	Persons	0	4,830	4,830
	Senior Services (05A)	Persons	475	1,013	1,488
	Handicapped Services (05B)	Persons	31	0	31
	Legal Services (05C)	Persons	241	0	241
	Youth Services (05D)	Persons	272	264	536
	Battered and Abused Spouses (05G)	Persons	46	0	46
	Subsistence Payment (05Q)	Persons	50	42	92
	Food Banks (05W)	Persons	234	305	539
	<b>Total Public Services</b>		<b>1,440</b>	<b>6,743</b>	<b>8,183</b>
<b>Grand Total</b>			<b>4,989</b>	<b>29,889</b>	<b>34,878</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	82	5
	Asian	0	0	1	0
Non Housing	<b>Total Housing</b>	<b>0</b>	<b>0</b>	<b>83</b>	<b>5</b>
	White	2,412	313	0	0
	Black/African American	132	0	0	0
	Asian	96	0	0	0
	American Indian/Alaskan Native	17	1	0	0
	Native Hawaiian/Other Pacific Islander	20	0	0	0
	American Indian/Alaskan Native & White	5	0	0	0
	Asian & White	5	1	0	0
	Black/African American & White	5	0	0	0
	Amer. Indian/Alaskan Native & Black/African Amer.	1	0	0	0
	Other multi-racial	121	7	0	0
Grand Total	<b>Total Non Housing</b>	<b>2,814</b>	<b>322</b>	<b>0</b>	<b>0</b>
	White	2,739	339	82	5
	Black/African American	157	0	0	0
	Asian	181	1	1	0
	American Indian/Alaskan Native	21	1	0	0
	Native Hawaiian/Other Pacific Islander	20	0	0	0
	American Indian/Alaskan Native & White	13	0	0	0
	Asian & White	5	1	0	0
	Black/African American & White	7	0	0	0
	Amer. Indian/Alaskan Native & Black/African Amer.	1	0	0	0
	Other multi-racial	209	48	0	0
	<b>Total Grand Total</b>	<b>3,353</b>	<b>390</b>	<b>83</b>	<b>5</b>



U.S. Department of Housing and Urban Development  
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Integrated Disbursement and Information System  
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CDBG Beneficiaries by Income Category

Income Levels		Owner Occupied	Renter Occupied	Persons
Housing	Extremely Low ( $\leq 30\%$ )	12	0	0
	Low ( $>30\%$ and $\leq 50\%$ )	8	0	0
	Mod ( $>50\%$ and $\leq 80\%$ )	0	0	0
	Total Low-Mod	20	0	0
	Non Low-Mod ( $>80\%$ )	0	0	0
	Total Beneficiaries	20	0	0
	Extremely Low ( $\leq 30\%$ )	0	0	664
	Low ( $>30\%$ and $\leq 50\%$ )	0	0	344
	Mod ( $>50\%$ and $\leq 80\%$ )	0	0	165
	Total Low-Mod	0	0	1,173
Non Housing	Non Low-Mod ( $>80\%$ )	0	0	33
	Total Beneficiaries	0	0	1,206