



# CITY OF PETALUMA 2010-2011

## CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)



North Bay Children's Center, Petaluma, CA

## CITY OF PETALUMA, CA

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### Staff:

John C. Brown, City Manager

Bonne Gaebler, Housing and Block Grant Administrator

Sue Castellucci, Housing and Block Grant Coordinator

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(CAPER)**

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**LIST OF ATTACHMENTS**

1. City of Petaluma Resolution No. 2010-053 N.C.S. – Approving the FY2010-2011 Action Plan
2. Public Notice of Availability of the City of Petaluma’s CAPER
3. IDIS Financial Summary



# 2010-2011 Consolidated Annual Performance Evaluation Report (CAPER)

## GENERAL

### Executive Summary

**FISCAL YEAR 2010-2011  
CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION (CAPER)  
EXECUTIVE SUMMARY**

#### Relationship To Consolidated Plan Strategy:

Operating as an entitlement jurisdiction under the Community Development Block Grant program, the City of Petaluma has an adopted 2010-2015 Consolidated Plan, which was approved by the Petaluma City Council on April 5, 2010 and will serve as the basis for CDBG funding for the five year planning period. All strategies and activities completed in FY 2010-2011 promote the goals of the Consolidated Plan and the Block Grant program: provide decent housing, establish and maintain a suitable living environment and expand economic opportunities, particularly for low and moderate income persons.

The City's annual entitlement of \$373,262 was utilized on projects and programs that directly benefit very low income Petalumans:

- maintenance activities at community homeless shelter (Committee On The Shelterless, **COTS**)
- housing rehabilitation for veterans (Community Housing of Sonoma County, **CHSC**)
- housing rehabilitation for persons with a disability (Disability Services and Legal Center, **DSLCL**)
- rehabilitation of campus classroom for very-low-income pre-schoolers (North Bay Childrens Center, **NBCC**)
- energy updates at senior housing residences (Petaluma Ecumenical Properties, **PEP Housing**)
- continuation of a senior meals program (Petaluma People Services Center, **PPSC**)

Throughout the CAPER, the acronym for each nonprofit bolded above will be used to avoid endless repetition.

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## Fair Housing and Equal Opportunity

The “promotion of housing choices and opportunities” is a Consolidated Plan priority. The City’s Analysis of Impediments (AI) is a tri-jurisdiction document in collaboration with the County of Sonoma and the City of Santa Rosa. An updated AI will be completed and reported on in the 2011-12 CAPER.

The City’s Fair Housing program and tenant-landlord mediation services were funded in 2010-2011 from the City’s Housing Fund; those programs are administered by PPSC.

### 2010-2011 Action Plan

Utilizing CDBG funding in the amount of \$373,262 (2010-2011 entitlement), community nonprofit agencies, in partnership with the City of Petaluma successfully provided services to address the community’s priorities as outlined in the 2010-2015 Consolidated Plan:

Enhance the quality of life for Petaluma’s senior citizens.

Enhance the quality of life for Petaluma’s low and moderate income youth including child care)

Facilitate projects and programs for Petalumans with special needs (e.g. homeless persons, the disability community, et al.)

Provide affordable rentals, particularly units with support services

Promote housing choices and opportunities

Support homeownership opportunities

Promote principles of sustainability.

### Other Resources

As in past years, the City maximizes our CDBG allocation by leveraging those funds with other funding sources that have been utilized for our affordable housing projects and programs:

- City of Petaluma In-Lieu Housing Fund
- City of Petaluma Redevelopment Low-Mod Set-aside
- City of Petaluma Commercial Linkage Housing Fund
- HOME
- Low-Income Housing Tax Credits
- Multi-Family Housing Bonds
- Emergency Housing Assistance Program
- HUD 202
- HUD 811
- McKinney-Vento Homeless Grants
- FESG
- Sonoma County Block Grant Funds
- Section 8 Subsidies

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## Geographical Distribution

The City's housing and CDBG activities are implemented in facilities and homes located throughout the community.

## Citizen Participation

The City has in place an updated (2011) detailed Citizen Participation Plan which contains the City's policies and procedures for public involvement in the CDBG process. The Citizen Participation Plan was utilized in implementing the 2010-11 Action Plan and staff interacts with subrecipients on a daily basis as they carry out their programs and projects.

- A Needs Assessment was completed in anticipation of adopting the Action Plan, utilizing a wide range of community-based agencies, including a Technical Advisory Workshop for all potential applicants.
- Held a public hearing before City Council.
- Interacted with other governmental agencies to coordinate all Block Grant-funded activities.
- Draft Action plan was made available to allow a public comment period by interested parties and a Draft CAPER was available for review by the public. No public comments were received.

Because formal public hearings often do not always include involvement by the community's low-income households, the CDBG program provides for and encourages public participation in small group settings, emphasizing involvement by low and moderate-income people. Also the City takes whatever actions are appropriate to encourage participation of minorities, people who do not speak English and people with disabilities.

## General Questions

- (1) Assessment of the one-year goals and objectives:
  - a. Describe the accomplishments in attaining the goals and objectives for the reporting period.
  - b. Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.
  - c. If applicable, explain why progress was not made towards meeting the goals and objectives.
- (2) Describe the manner in which the recipient would change its program as a result of its experiences.
- (3) Affirmatively Furthering Fair Housing:
  - a. Provide a summary of impediments to fair housing choice.
  - b. Identify actions taken to overcome effects of impediments identified.
- (4) Describe Other Actions in Strategic Plan or Action Plan taken to address obstacles to meeting underserved needs.
- (5) Leveraging Resources
  - a. Identify progress in obtaining "other" public and private resources to address needs.
  - b. How Federal resources from HUD leveraged other public and private resources.
  - c. How matching requirements were satisfied.

**(1) ASSESSMENT OF THE ONE-YEAR 2010-2011 GOALS AND OBJECTIVES:**

- a. *Descriptions of the accomplishments in addressing the 2010-11 goals and objectives are summarized below.*

**Consolidated Plan Priority 1:** Enhance the quality of life for Petaluma's senior citizens.

**2010-2011 CDBG** funds were utilized by PPSC to provide low-income seniors with a daily hot meal and a security and wellness check.

**2010-2011 CDBG** funds were utilized for energy conservation updates by PEP Housing at one of their older properties

**Other funding** was utilized to enhance the lives of Petaluma's senior citizens which included:

Housing rehabilitation serving seniors: Low-mod Housing Funds were utilized by Rebuilding Together Petaluma to modify, update, and rehabilitate homes of low-income and/or disabled seniors.

Rent subsidies for seniors: A PPSC program, Close The Gap, funded through the City's Housing Funds, provides rent subsidies for qualified very-low income seniors;

Mobile Home Rent Control: The City's 1994 Mobile Home Rent Stabilization ordinance is designed to protect low-income mobile home owners, primarily seniors, from burdensome rent increases.

**Consolidated Plan Priority 2:** Enhance the quality of life for Petaluma's low and moderate income youth (including child care)

**2010-2011 Community Development Block Grant** funds were utilized by **NBCC** to increase the capacity of the classroom of the pre-school facility serving very-low income children (100% of whom have English as a second language).

**Other** City funds were utilized by the **Boys and Girls Club** to operate an on-site club at five affordable family housing properties Monday through Friday from 2:00-6:00 p.m. (as well as an all-day summer program) and operate programs in: health and life skills; sports, fitness and recreation; character development and leadership development; and education and career development. The B&G Club also provides summer scholarships to the children in the Mary Isaak Center.

Licensed child care is offered on-site at one of the City's family affordable housing properties, Old Elm Village, operated by 4-C's a countywide child care provider

**Consolidated Plan Priority 3:** Facilitate projects and programs for Petalumans with special needs (homeless persons, the disability community, et al.)

**2010-2011 Community Development Block Grant** funds were utilized by **COTS** for much-needed maintenance services at the Mary Isaak Center, at the City's homeless facility for families and single adults (most of whom suffer from multiple physical and mental disabilities).

**2010-2011 Block Grant** funds were utilized by **CHSC** to rehabilitate a home to serve veterans with a mental illness (in partnership with NAMI, the National Alliance for Mental Illness)

**2010-2011 Block Grant** funds were utilized by **DSL** to rehabilitate and/or modify homes to accommodate persons with disabilities.

**Other Housing** funds have been utilized to address this priority. Due to City of Petaluma budget constraints caused by the economic downturn all homeless services have been consolidated into the Mary Isaak Center which includes the operation of a state-of-the-art 100-bed emergency shelter for adults without children; transitional housing for families with children, a resource center for jobs and counseling, substance abuse programs, information and referral to various service providers.

**Other** City funds were utilized by several agencies to provide transitional housing services for previously homeless consumers listed below:

- COTS has, in past years, operated six homes in their shared housing services program, which provided transitional and shared housing for previously homeless families. Following the transfer of families into the Mary Isaak

Center, the adults residing there have been moved into these units and the "shared" families have been relocated to existing market rate apartments. This program modification is a benefit to all concerned providing the families with a greater sense of responsibility and independence and greatly reducing the wear and tear on the homes caused by the families with children. The city provides the properties rent-free; COTS can then support this program through rental income.

- Salvation Army managed the Petaluma Area Transitional Housing (PATH) program assisting previously homeless families with rental subsidies, counseling, and family budget management.
- Viet Nam Veterans of California operated transitional housing for previously homeless veterans in a City-donated house, providing very-low income housing, extensive counseling, employment referrals, and drug and alcohol programs.

**Consolidated Plan Priority 4:** Provide rental units for very low and low-income residents, particularly those units with support services

**Other** funds were utilized for pre-development costs for the Wood Sorrel project, a development project of Petaluma Ecumenical Properties (PEP Housing). USA Properties completed the planning process and gained all land use approvals for Phase II of Vintage Chateau, a 67-unit low-income senior project. Vintage Chateau II will break ground in July 2011. Burbank Housing Development Corporation, a community nonprofit agency, utilized Low-Mod funds for site acquisition and pre-development to complete the land use approval process for Logan Place, a 67-unit work-force affordable community. All competitive financing for that development has been secured (HOME, MHP); low income tax credits and bond financing is being pursued with a plan to break ground in Spring 2012.

**Consolidated Plan Priority 5:** Promote housing choices and opportunities.

**Other Housing** funds were utilized by PPSC to continue to successfully administer the City's Fair Housing and Landlord-tenant Mediation/ Information/Referral service.

Block Grant staff updated the City's Citizen Participation Plan and coordinated with the County's other entitlement jurisdiction to update a tri-jurisdictional Analysis of Impediments (to be completed in 2011-12).

**Consolidated Plan Priority 6:** Support homeownership opportunities.

**Other funding sources** are utilized to administer the sales, re-sales, and refinances of the homes which are included in the City's homeownership program aimed at low and moderate income first time homebuyers. The City has contracted with the Housing Land Trust to coordinate development, sales, and re-sales of any new homeowner opportunities.

**Consolidated Plan Priority 7:** Promote principles of sustainability (e.g. energy efficiency, proximity to transit, water conservation, etc.)

**2010-2011 CDBG funds were utilized** by PEP Housing to complete energy update projects on their low-income senior rental communities.

**Other** funds were utilized by Rebuilding Together to maintain a sustainable community by rehabilitating low-income housing for persons who are elderly, disabled, or in need. Typical projects include new insulation, electrical wiring, roofs and gutters, windows, updated plumbing, etc.

One of our newer affordable housing developments, Downtown River Apartments, received a grant from Pacific Gas & Electric to install photovoltaic panels and to introduce a recycling program to all of its residents. City Housing funds provided a match for the grant. The photovoltaic panels were installed and in operation by July 2011.

- b. *Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.*

For the program year 2010-11 the City of Petaluma received an entitlement amount of \$373,262 from HUD under the Community Development Block Grant Program.

There are statutory requirements for Block Grant funds and all activities funded by Petaluma adhered to those requirements: (1) at least 60% of the funds were used for activities that benefited low and moderate income persons (in our case 100% of the funds benefited low/mod residents); and (2) all funds were used exclusively for the three national objectives.

Those objectives are: (1) the administration of a program which benefits low and moderate income persons; (2) aids in the prevention or elimination of slums or blight or (3) meets other community development needs having a particular urgency.

**The following specific programs or projects were approved by the City Council and implemented to meet our local priorities and the national objectives:**

<b>Program administration.</b>	<b>\$50,000</b>
<b>DSLCC assessed and rehabilitated dwelling units to remove barriers for persons with a disability.</b>	<b>\$43,727</b>
<b>PPSC administered a senior meals program.</b>	<b>\$55,989</b>
<b>NBCC rehabilitated a child care center for low-income pre-schoolers.</b>	<b>\$61,050</b>
<b>CHSC rehabilitated a home for veterans with mental illness</b>	<b>\$83,250</b>
<b>COTS completed maintenance tasks at Mary Isaak center, serving homeless shelter residents.</b>	<b>\$29,295</b>
<b>PEP Housing implemented energy updates at senior apartment communities.</b>	<b>\$49,950</b>
<b>Total 2010-2011 Block Grant Allocation</b>	<b>\$373,262</b>

None of the aforementioned activities resulted in the displacement of any households; fair housing and equal opportunity are promoted in all activities and programs.

c. N/A

**(2) Describe the manner in which the recipient would change its program as a result of its experiences.**

In the previous years, the City of Petaluma has reviewed and updated its policies and procedures as well as utilizing the CPMP tools for completing our Action Plans and CAPERS. Since implementing the changes, the City's programs operate smoothly and achieve the goals that have been identified. As a result of this, changes in program administration are not being considered.

**(3) Affirmatively Furthering Fair Housing:**

a. The City of Petaluma is in the process of collaborating with the City of Santa Rosa and the County of Sonoma, the other entitlement jurisdictions located in Sonoma County, to collectively update the Analysis of Impediments to Fair Housing Choice (AI). A copy of the updated document will be submitted with the 2011-12 CAPER. The current AI includes the following recommendations:

- Continue maintenance and production of affordable housing as a key element of the plan;
- Encourage more work force housing opportunities;
- Continue to provide for access modifications to rental properties, as well as owner-occupied properties;
- Ensure adequate support for the HUD-mandated level of fair housing activity; and
- Continually assess policies, procedures, and guidelines to identify any overly restrictive elements.

*Provide a summary of impediments to fair housing choice.*

Affordable Housing:

- Sonoma County is not immune to the actions, attitudes and conditions that may create impediments to fair housing choice in its population.
- A disproportionate number of Sonoma County residents experience a cost burden, often severe, in maintaining housing.
- In many cases, the burden is compounded by other housing problems, such as overcrowded conditions or substandard housing.
- The lack of access to affordable housing, when added to the needs of many of the protected classes of citizens, compounds the difficulties that those individuals may experience in obtaining or maintaining affordable permanent housing.

Fair Housing:

- Little evidence of discrimination in lending was found to be occurring throughout Sonoma County, although the available data does not portray the degree to which differential treatment and/or predatory lending practices may exist.

- None of the jurisdictions are currently involved in any legal actions or litigations regarding fair housing law.
- Disability, race, familial status, and national origin are the primary areas of fair housing complaints registered.
- Screening tactics used by landlords and staunch income and security deposit requirements for approval of rental applications may be insurmountable burdens to the low-income population who may not have stellar credit ratings or sufficiently available cash.

#### Housing Rehabilitation:

- Those with disabilities may encounter significant challenges in finding or maintaining housing that is accommodating of their needs.
- Accessibility restraints and the lack of means to rectify them may be instrumental in causing elderly or disabled populations to enter nursing homes or other institutional settings prematurely.

#### Economic Development:

- Limited proficiency in English language may cause difficulty in house seeking and may afford an avenue allowing abusive terms and conditions to be enforced in both rental and ownership contracts.
- Education, job training, and credit counseling options may not be readily available to low-income persons to enable them to rise to the challenge of obtaining and maintaining permanent housing in a high-cost area such as Sonoma County.

#### Interagency Collaboration:

- Overall funding reductions have the potential for becoming an impediment to fair housing choice.

#### Public Policy:

- A lack of proactive code enforcement may allow substandard housing units to go un-repaired, and low-income, elderly, disabled, and minority tenants may consequently live in unsafe conditions.

*b. Identify actions taken to overcome effects of impediments identified.*

#### Affordable Housing:

- Continue maintenance and production of affordable housing as a key element of the plan.
- All segments of the populace, seniors, young families, large families, those with disabilities, should be considered in the allocation of funding for projects.
- Homeownership opportunities, through first-time homebuyer and self-help programs, should remain priorities if funding is sustainable.
- Ensure that as much of the available funding as possible is made available to affordable housing projects that leverage additional funding.
- Ensure that notices of funding availability are adequately disseminated to potential developers and service providers, and that the application procedure is attainable, practicable, and not overly restrictive.
- Foster collaboration between housing developers and other service providers that can result in blocks of units with supportive services in new affordable housing projects targeted towards specific special needs populations, such as those with mental disabilities or farm workers.

- Jurisdictional policies should require that all new housing units funded conform to the provisions of Section 504 to ensure an acceptable number of accessible and adaptable units upon completion.

#### Housing Rehabilitation:

- Maintain provisions for the operation and/or funding of housing rehabilitation activities, including housing access modifications programs to preserve the existing housing stock.
- Continue to provide for access modifications to rental properties, as well as owner-occupied properties.
- Assist low-income elderly and disabled households in maintaining housing in lieu of becoming homeless or being driven into institutional facilities prematurely.

#### Fair Housing:

- Continue to provide funding for the provision of fair housing services, including outreach and education activities for both landlords and tenants.
- As overall funding levels decrease, consider a “set-aside” of funding to ensure adequate support for the provision of, at a minimum, the HUD-mandated level of fair housing activity.
- Include Fair Housing provisions in all contracts with subgrantees.
- Continue desktop and site visit monitoring to ensure that all allocated funding is used in a manner that affirmatively furthers fair housing, where applicable.
- Limited English Proficiency (LEP) – The City of Petaluma has developed a policy to protect the individual recipients of its services from the effects of discrimination because of their race, color or national origin. The goal of this policy is to provide meaningful access to translation or interpreter services, for person with Limited English Proficiency. This policy takes affirmative steps to communicate with people who need services or information in a language other than English and extends to all subrecipients who are partners in our programs.

#### Economic Development:

- Support economic development activities, family self-sufficiency and other educational endeavor, such as ESL instruction and credit counseling, to provide low-income residents with the tools to increase their income and compete effectively in this high-cost housing market.

#### Interagency Collaboration:

- Collaborate with public works officials to facilitate ADA-compliant access and functional public transportation options linking both current and planned affordable housing units to employment opportunities and services.
- Interact with private lenders to ensure equal terms for all home-seeking applicants and to provide avenues for effective usage of Community Reinvestment Act (CRA) funds.
- Align with other funding agencies to prevent duplication of efforts and over burdensome administration expenses, both within their own operations and those of the agencies funded.

**Public Policy:**

- Guard against land use policies and zoning ordinances that prevent or impede the development of a range of housing options, becoming an impediment to choice in and of themselves.
- Encourage participation by a varied group of citizenry in the planning process.
- Continually assess policies, procedures and guidelines to identify any overly restrictive elements.
- Make revisions necessary to enable fair housing choice while, at the same time, continuing to protect the health and safety of the community.

**(4) Describe Other Actions in Strategic Plan or Action Plan taken to address obstacles to meeting underserved needs.**

Assuming that "other actions" means non-Block Grant actions taken to address obstacles to meeting underserved needs, please see General Question #5, "leveraging resources," below.

**(5) Leveraging Resources**

*5a. and b. Identify progress in obtaining "other" public and private resources to address needs and how federal resources from HUD leveraged other public and private resources.*

Petaluma must use other **non-CDBG** resources to address the City's priorities because the City's CDBG entitlement is a modest one. It is vital that those funds are maximally leveraged by other resources available to serve low and moderate-income residents, particularly in the production of affordable housing. Those resources include the following list which is amplified below:

2010-2011 City Housing Fund (see description below)  
 HOME Program  
 HUD 202, HUD 811  
 Emergency Housing Assistance Program  
 Other Federal Resources  
 Non-Governmental Resources  
 Multi-family Revenue Bonds

**2010-2011 City Housing Fund:** This fund is the City's largest (amounts to approximately \$3,500,000 annually and most flexible source of funds for affordable housing. This fund is comprised of the City's in-lieu housing contributions (a requirement of Policy 4.2 of the City's State certified 2009-2014 Housing Element of the General Plan), the Redevelopment Agency 20% set-aside of tax increment funds for low and moderate-income housing, the 2005-adopted Commercial Housing Linkage fee, program income, interest and loan repayments. The future of redevelopment tax increment financing is unsure.

The Housing Fund is distributed via a Request For Proposal (RFP) process. When requests for fund allocations are submitted, each proposal is screened to ensure that it addresses one or more of the Consolidated Plan priorities, as well as General Plan and Redevelopment Implementation Plan goals and objectives.

## HOME Program Funds

The City of Petaluma applies directly to the California State Department of Housing and Community Development (HCD) for HOME funds. The City has been awarded seven HOME grants:

• 1996 Round Walk Village	129 units
• 1998 Old Elm Village	88
• 2000 Edith Street Senior Apts.	23
• 2001 Lieb Senior Apts.	23
• 2002 Downtown River Apartments	81
• 2005 Casa Grande Senior Apts.	57
• <u>2010 Logan Place</u>	<u>66</u>
<b>TOTAL HOME UNITS</b>	<b>467</b>

An eighth application has been submitted for consideration for 2011 HOME funds for Kellgren Senior Apartments, a PEP Housing development consisting of 50 senior apartments. The disposition of that application will be reported on in the 2012 CAPER.

## HUD-funded Projects

Petaluma has three HUD 202 projects:

• Edith Street Senior Apts.	22 units
• Lieb Senior Apartments	22 units
• Casa Grande Senior Apts	44 units (plus 13 non-HUD funded)

A fourth 202 application has been submitted to HUD for Kellgren Senior Apartments; the disposition of that application will be reported on in the 2012 CAPER.

Petaluma has two HUD 811 projects:

• Salishan Apts. for persons with a developmental disability	13 units
• Boulevard Apts. for persons with a mental disability	14 units

Petaluma has one 236 project:

• Petaluma Senior Apartments	57 units
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Petaluma has one LIHPRA project:

• Park Lane Apartments	<u>90 units</u>
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**TOTAL HUD FUNDED UNITS** **262**

## Emergency Housing Assistance Program:

Other **McKinney Vento Continuum of Care programs:** The City of Petaluma, the Sonoma County Community Development Commission, and the City of Santa Rosa (the three county entitlement jurisdictions) work together with homeless service providers to identify and prioritize homeless issues and needs in Sonoma County. In addition to the \$1.6 million plus this process provides, the Continuum produced the



**Petaluma Hotel/Single-Room-Occupancy (SRO) Facility** – Petaluma is fortunate to have the largest SRO in the North Bay and the only one in Sonoma County, with 104 low-income units, which is home to many of the County's very-low income retired and working people.

The rents range from \$500 to \$550 for a room with a shared bath to \$650 to \$725 for a room with bath. All rooms include utilities. Recent data shows that 10% percent of the residents are retired and more than 50% work everyday, most in jobs located in Sonoma County.

**Private grant/foundation funding**, such as the Sonoma Foundation and United Way, has assisted housing and neighborhood revitalization projects. The faith-based community is actively involved in Petaluma's efforts to house our most-needy population. The Church/Synagogue Shelter Program has increased the capacity of the City's family shelter by 30%. All nonprofit agencies are recipients of substantial private donations.

**Mobile Home Rent Stabilization Program** – The City of Petaluma is home to 868 mobile home spaces located in seven parks. All but one is "senior-only" and these parks are a rich source of affordable housing for our community's senior citizens. The City has had a rent stabilization ordinance since 1994 and 191 spaces are covered under the ordinance, which ties space rent increases to the annual consumers price index.

**Second Units (Accessory Dwellings)** – There are approximately 75 known second units in Petaluma and, although income verification is not done on the residents of those dwellings, it can be assumed that they are generally more affordable than other market rate housing.

#### **5c. How matching requirements were satisfied.**

\$7,500 of funding from the City's Housing Fund was utilized to provide federal "match" requirement for a HUD grant, through McKinney Vento funding.

### **3. Managing the Process**

1. Describe actions taken during the last year to ensure compliance with program and comprehensive planning requirements.

The application process has been fine tuned, with a checklist to make sure the required paperwork has been received from the subrecipient as well as making sure the request is for an eligible activity. The selection process activities were evaluated based on the consistency with the priorities needs identified in the 2010-2015 Consolidated Plan, as well as compliance with CDBG national objectives.

A public notice is published in January announcing a Technical Assistance Workshop for all interested participants who are requesting CDBG funds. The technical workshop is held in February and is a mandatory meeting for all subrecipients. At this workshop, the potential projects were discussed and the performance measurement criteria are discussed.

The applicants are given fifteen (15) days to complete and return their applications to the City of Petaluma's Housing Division. The applications are reviewed to make sure they fulfill the City's priorities. The Housing staff makes a recommendation to the Petaluma City Council on the programs and projects to be funded at a public hearing.

Throughout the year, the City of Petaluma receives quarterly reports (if applicable) from each subrecipient as well as on-site consultation to oversee problems or concerns that need to be handled.

#### **4. Citizen Participation**

1. Provide a summary of citizen comments.

**The City of Petaluma received no comments from the public on our 2010-2011 CAPER.**

2. In addition, the performance report provided to citizens must identify the Federal funds made available for furthering the objectives of the Consolidated Plan. For each formula grant program, the grantee shall identify the total amount of funds available (including estimated program income), the total amount of funds committed during the reporting period, the total amount expended during the reporting period, and the geographic distribution and location of expenditures. Jurisdictions are encouraged to include maps in describing the geographic distribution and location of investment (including areas of minority concentration). The geographic distribution and expenditure requirement may also be satisfied by specifying the census tracts where expenditures were concentrated.

The Draft CAPER was publicly noticed in the local newspaper in both English and Spanish, as required by HUD (See Attachment 3); was made available for public review at the City's Housing Division office; was made available to interested individuals free-of-charge; copies were provided upon request in a timely fashion (within two days), a copy was posted on the Housing website, and staff was available to answer any questions or comments that the public might have.

#### **5. Institutional Structure**

1. Describe actions taken during the last year to overcome gaps in institutional structures and enhance coordination.

No gaps have been identified in our institutional structure. One of our program's strongest features is the collaboration and cooperation among all city departments and community agencies.

#### **6. Monitoring**

1. Describe how and the frequency with which you monitored your activities.

2. Describe the results of your monitoring including any improvements.
3. Self Evaluation
  - a. Describe the effect programs have in solving neighborhood and community problems.
  - b. Describe progress in meeting priority needs and specific objectives and help make community's vision of the future a reality.
  - c. Describe how you provided decent housing and a suitable living environment and expanded economic opportunity principally for low and moderate-income persons.
  - d. Indicate any activities falling behind schedule.
  - e. Describe how activities and strategies made an impact on identified needs.
  - f. Identify indicators that would best describe the results.
  - g. Identify barriers that had a negative impact on fulfilling the strategies and overall vision.
  - h. Identify whether major goals are on target and discuss reasons for those that are not on target.
  - i. Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

## **6.1 HOW AND FREQUENCY OF MONITORING**

The City of Petaluma Housing staff regularly monitors CDBG funded activities to ensure that all projects are administered in compliance with applicable regulations and that their accomplishments are addressing the priorities established in the Consolidated Plan. Since the majority of the funding allocated to the City of Petaluma is provided to nonprofit agencies, it is crucial to provide technical assistance and to monitor the performance of our subrecipients. All of the City's programs and activities funded under the CDBG program are implemented by qualified subrecipients who enter into a contractual agreement with the City of Petaluma to implement specific programs and services. With the CDBG subrecipients, we monitor their activities on a quarterly basis when they submit their Quarterly Status Report. Throughout the year, we meet with each subrecipient to review their progress with their program and see if there have been any problems or concerns. At the end of the fiscal year, we complete an annual report on each subrecipient. We keep in close contact with our non-profit subrecipients and consult with them on a continual basis.

If a subrecipient is experiencing problems or failing to comply with regulations, a letter that provides recommendations on how the situation can be remedied will be sent. If a finding is issued, a letter will be sent identifying a deadline for when the specific issues must be corrected with a follow-up visit to the organization to make sure the corrections have been made.

## **6-2. RESULTS OF MONITORING**

The City of Petaluma did not issue any "concerns" or "findings" during the FY 2010-2011. Our subrecipients did not encounter any problems in performing their programs and/or services.

## **6-3. SELF EVALUATION**

a. Describe the effect programs have in solving neighborhood and community problems.

CDBG is a vital tool because it is one of the few resources available to our community to provide services which have a positive effect on our neighborhoods and address community problems.

b. Describe progress in meeting priority needs and specific objectives and help make community's vision of the future a reality.

The programs and projects which address priority needs have been described under General Question #1. In addition to financial investment in housing for low and moderate income households, the City of Petaluma assists in other dimensions to carry out the priorities and goals of the Consolidated Plan strategy, including public policy determinations and implementation, institutional structure, and intergovernmental cooperation.

c. Describe how you provided decent housing and a suitable living environment and expanded economic opportunity principally for low and moderate-income persons.

Decent housing and a suitable living environment were provided via the multitude of programs and projects as described in general Question #1 and #5. Expanded economic opportunities were made available as a result of affordable housing, high quality child care, youth programs, and good transportation planning.

d. Indicate any activities falling behind schedule.

All projects and programs are on schedule.

e. Describe how activities and strategies made an impact on identified needs.

Each activity which has been funded in 2010-2011 addresses an identified need in our community and is within the parameters of the Consolidated Plan list of priorities as described in General Question #1.a. Additionally, the City completed its 2009-2014 Housing Element which was certified by HCD on July 31, 2009 and specifically details progress in meeting goals and objectives.

f. Identify indicators that would best describe the results.

FY Program Year 2010-2011:

Subrecipient	Objective/Outcome	Indicators
PPSC/Senior Meals	SL-1	Goal: 200 people to be served.
CHSC	SL-1	Goal: Rehab home for veterans with mental illness

NBCC	SL-1	Goal: rehab classroom at 1 public facility, 109 people served
DSLCC	DH-1	Goal: 9 units rehabilitated
COTS	SL-1	Goal: Rehab homeless shelter, 1 public facility, 500 people served
PEP Housing	DH-1	Goal: rehab 31 units of affordable house, 31 people served

- g. Identify barriers that had a negative impact on fulfilling the strategies and overall vision.

There exist barriers which are outside the control of local government and the Block Grant Program, among them the extremely high cost of living in Sonoma County, the extremely high cost of housing construction, increased gang activity, declining general fund revenues, increased immigration population with few employee skills, limited health insurance, etc. These forces play a large role in the quality of life of our low-income residents.

- h. Identify whether major goals are on target and discuss reasons for those that are not on target.

All of major goals are on target; none have been unduly delayed.

- i. Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

See General Question #2.

## 7. Lead-based Paint

1. Describe actions taken during the last year to evaluate and reduce lead-based paint hazards.

It is a requirement of the Consolidated Plan process to discuss the need to evaluate and reduce the number of housing units containing lead-based paint hazards in order to increase the inventory of lead-safe housing available to low-income households.

The hazard of lead based paint is defined by the Federal Government as any condition that causes exposure to lead from lead-contaminated dust, lead-contaminated soil, lead-contaminated paint that is deteriorated or present in accessible surfaces, friction surfaces, or impact surfaces that would result in adverse human health effects.

The City of Petaluma is prepared to comply with the lead-based paint regulation, implementing Title X of the Housing and Community Development Act of 1992. Approximately 10% of the City of Petaluma’s housing units were built before 1978, with an even smaller percentage affecting our low-income household population. Most of the affordable housing units have been built after 1978 and lead-based paint is not an allowable product. Rebuilding Together, a non-profit corporation, targets our older homes when they do their rehab work for the City.

**8. Housing Needs**

1. Describe Actions taken during the last year to foster and maintain affordable housing.

**Foster:**

In spite of the drastic economic issues facing affordable housing production and maintenance, the City “fast-tracked” two affordable developments through the land use approval process:

- Vintage Chateau II
- Kellgren Senior Apartments

The City was also successful in finalizing State of California HOME funding for Logan Place

**Maintain:**

Provided matching funds to enable Eden Housing, Inc. to receive one of two major PGE grants to install 1200 solar panels on Downtown River Apartments, 80 units of work force housing.

**9. Specific Housing Objectives**

1. Evaluate progress in meeting specific objective of providing affordable housing, including the number of extremely low-income, low-income, and moderate-income renter and owner households comparing actual accomplishments with proposed goals during the reporting period.

Income	2010-2011		2011-2012		2012-2013		2013-2014		2014-2015	
	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Very Low		0	14		40		49			
Low		0	53		25		0			
Moderate		0	1		1		1			
Above Moderate										
TOTAL		0	68		66		50			

2. Evaluate progress in providing affordable housing that meets the Section 215 definition of affordable housing for rental and owner households comparing actual accomplishments with proposed goals during the reporting period.

There were no new rental affordable housing units completed in 2010-2011.

3. Describe efforts to address “worst-case” housing needs and housing needs of persons with disabilities.

The City of Petaluma has assisted projects that incorporate housing that is accessible for persons with disabilities or severe housing needs, such as the homeless, including the following:

- COTS– Maintenance projects at the City’s homeless facility
- DSLC – Rehabbing Owner-Occupied units for the disabled

## 10. Public Housing Strategy

1. Describe actions taken during the last year to improve public housing and resident initiatives.

### THE CITY IS NOT A RECIPIENT OF PUBLIC HOUSING FUNDS

## 11. Barriers to Affordable Housing

1. Describe actions taken during the last year to eliminate barriers to affordable housing.

More importantly than a description of actions taken in the last year, are the policy statements included in the City’s long-range planning documents regarding barriers to affordable housing.

As stated in Chapter 5 of the City’s Housing Element, a number of factors may constrain the development of housing, particularly housing affordable to lower-income households. These factors can generally be divided into “governmental constraints” or those that are controlled by federal, state, or local governments; and “nongovernmental constraints,” factors that are not generally created or cannot be affected by government controls.

An analysis of governmental constraints was considered in the development of programs to eliminate barriers to affordable housing and are covered in detail in Chapter 5 of the City’s Housing Element:

General Plan policies, Zoning provisions, density bonuses, a residential growth system, project review and approval, adopted codes, required fees and improvements.

## 12. HOME/ American Dream Down Payment Initiative (ADDI)

1. Assessment of Relationship of HOME Funds to Goals and Objectives
  - a. Evaluate progress made toward meeting goals for providing affordable housing using HOME funds, including the number and types of households served.
2. HOME Match Report
  - a. Use HOME Match Report HUD-40107-A to report on match contributions for the period covered by the Consolidated Plan program year.
3. HOME MBE and WBE Report
  - a. Use Part III of HUD Form 40107 to report contracts and subcontracts with Minority Business Enterprises (MBEs) and Women's Business Enterprises (WBEs).
4. Assessments
  - a. Detail results of on-site inspections of rental housing.
  - b. Describe the HOME jurisdiction's affirmative marketing actions.
  - c. Describe outreach to minority and women owned businesses.

**HOME: CITY IS NOT A HOME ENTITLEMENT JURISDICTION; WE APPLY FOR FUNDING ON A PROJECT-SPECIFIC BASIS. SEE PAGE 15, #5, LEVERAGING RESOURCES AND PAGE 15, HOME PROGRAM FUNDS.**

**ADDI: CITY IS NOT A RECIPIENT OF ADDI.**

## 13. Homeless Needs

Identify actions to help homeless persons make the transition to permanent housing and independent living.

***See General Question #1 – Consolidated Plan Priority #3***

1. Identify new Federal resources obtained from Homeless SuperNOFA.

**The City of Petaluma benefits from the SuperNOFA through participation in the Continuum of Care Planning Process.** Since 1997, the City of Petaluma, the Sonoma County Community Development Commission, and the City of Santa Rosa (the three county entitlement jurisdictions) have worked together and with homeless service providers to identify and prioritize homeless issues and needs in Sonoma County. While the City of Petaluma is well served by the Committee On The Shelterless (COTS), cooperation at a regional level is imperative to address the goal of providing homeless services among all County communities. The Continuum of Care process has brought over \$2 million dollars into our community to date.

## 14. Specific Homeless Prevention Elements

1. Identify actions taken to prevent homelessness.

The City of Petaluma's Housing Fund provides funding to the Petaluma People Services Center (PPSC) Homeless Prevention Program, which since 1989 has provided financial assistance for housing and critical needs to families and individuals who are homeless or threatened with homelessness. A list of the top ten needs of the homeless population in Sonoma County included in a 1997 survey conducted by the Sonoma County Task Force on the Homeless listed rental assistance and security deposit assistance as the second- and third-highest needs. This is still true today.

The Agency's funding provides administrative and operational support to two components of the Homeless Prevention Program. The Mediated Assistance Program assists Petaluma individuals and families seeking to retain affordable housing by making a one-time payment of rent or mortgage on their behalf. The Renters Assistance Program is a loan program for the up-front costs of renting a home. Clients also receive information, referrals and counseling services to prevent future threats to their stability.

Typical clients served by these programs are normally self-sufficient families with children whose incomes are less than 50 percent of the median and who are faced with unplanned financial emergencies. These emergencies include medical crises, break-up of the family unit, steep increases in rent or utilities, or other unforeseen financial burdens that result in their postponing rent payments. The PPSC provides timely assistance to residents who have exhausted all other avenues and are facing eviction or loss of their homes due to foreclosure.

The City of Petaluma operates from a Homeless Master Plan. City housing officials and police staff developed a scope of work with COTS, to assess needs and identify resources; begin a dialogue regarding the expansion of County services to Petaluma and the South County; initiate sub-regional cooperative efforts; and formulate policy recommendations including a facility site.

Working from that plan, we have made great strides in prevention of the homeless. With COTS as the service provider, the City has a state-of-the-art facility which provides shelter beds, transitional units, in-depth services to accommodate the unique needs of the population, and a full service kitchen facility. All services are aimed at the goal of securing permanent housing and the prevention of a return to homelessness.

## **15. Emergency Shelter Grants (ESG)**

1. Identify actions to address emergency shelter and transitional housing needs of homeless individuals and families (including significant subpopulations such as those living on the streets).
2. Assessment of Relationship of ESG Funds to Goals and Objectives
  - a. Evaluate progress made in using ESG funds to address homeless and homeless prevention needs, goals, and specific objectives established in the Consolidated Plan.
  - b. Detail how ESG projects are related to implementation of comprehensive homeless planning strategy, including the number and types of individuals and persons in households served with ESG funds.

3. Matching Resources
  - a. Provide specific sources and amounts of new funding used to meet match as required by 42 USC 11375(a)(1), including cash resources, grants, and staff salaries, as well as in-kind contributions such as the value of a building or lease, donated materials, or volunteer time.
4. State Method of Distribution
  - a. States must describe their method of distribution and how it rated and selected its local government agencies and private nonprofit organizations acting as subrecipients.
5. Activity and Beneficiary Data
  - a. Completion of attached Emergency Shelter Grant Program Performance Chart or other reports showing ESGP expenditures by type of activity. Also describe any problems in collecting, reporting, and evaluating the reliability of this information.
  - b. Homeless Discharge Coordination
    - i. As part of the government developing and implementing a homeless discharge coordination policy, ESG homeless prevention funds may be used to assist very-low income individuals and families at risk of becoming homeless after being released from publicly funded institutions such as health care facilities, foster care or other youth facilities, or corrections institutions or programs.
  - c. Explain how your government is instituting a homeless discharge coordination policy, and how ESG homeless prevention funds are being used in this effort.

**CITY IS NOT A RECIPIENT OF ESG FUNDING. INDEPENDENTLY, COTS APPLIES FOR AND IS SUCCESSFUL IN RECEIVING ANNUAL FESG GRANTS**

## 16. Community Development

1. Assessment of Relationship of CDBG Funds to Goals and Objectives
  - a. Assess use of CDBG funds in relation to the priorities, needs, goals, and specific objectives in the Consolidated Plan, particularly the highest priority activities.

See General Question #1

- b. Evaluate progress made toward meeting goals for providing affordable housing using CDBG funds, including the number and types of households served.

Priority Need	Budgeted FY 2010-2011	% of Total Funds
Youth & Special Needs Population	173,595	47%

Elderly Population	93,677	25%
Public Service	55,989	15%
Admin Costs	50,000	13%

Activity	FY 2010-2011 Expenditures	Proposed Numbers	Actual Numbers	Outcome & Objective
DSLCL – rehabbing houses for disabled.	\$43,727	9	5	DH-1
PPSC – Senior Meals (Public Service)	\$55,989	200	215	SL-1
NBCC– Rehab child care kitchen	\$61,050	109	78	SL-1
CHSC – Rehabbed a home for veterans	\$83,250	1	1	SL-1
COTS – Maintenance at homeless facility	\$29,295	500	541	SL-1
PEP Housing – rehab senior housing units – energy updates	\$49,950	31	44	DH-1
City of Petaluma – Admin costs	\$50,000			

- c. Indicate the extent to which CDBG funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons.

100% of CDBG funds were used for activities that benefited extremely low, low, or moderate income persons.

- 2. Changes in Program Objectives
  - a. Identify the nature of and the reasons for any changes in program objectives and how the jurisdiction would change its program as a result of its experiences.

See General Question #2

- 3. Assessment of Efforts in Carrying Out Planned Actions
  - a. Indicate how grantee pursued all resources indicated in the Consolidated Plan.

See General Questions 1 & 5

- b. Indicate how grantee provided certifications of consistency in a fair and impartial manner.

The City of Petaluma maintains a public Request For Proposals process to identify activities that will be funded each program year. This process is open to all who wish to submit proposals. Following that a technical workshop is held by staff to ensure consistency in a fair and impartial manner.

- c. Indicate how grantee did not hinder Consolidated Plan implementation by action or willful inaction.

On the contrary, all actions taken encouraged and facilitated the implementation of the Consolidated Plan.

4. For Funds Not Used for National Objectives
  - a. Indicate how use of CDBG funds did not meet national objectives.
  - b. Indicate how did not comply with overall benefit certification.

All CDBG funds met National Objectives.

5. Anti-displacement and Relocation – for activities that involve acquisition, rehabilitation or demolition of occupied real property
  - a. Describe steps actually taken to minimize the amount of displacement resulting from the CDBG-assisted activities.
  - b. Describe steps taken to identify households, businesses, farms or nonprofit organizations who occupied properties subject to the Uniform Relocation Act or Section 104(d) of the Housing and Community Development Act of 1974, as amended, and whether or not they were displaced, and the nature of their needs and preferences.
  - c. Describe steps taken to ensure the timely issuance of information notices to displaced households, businesses, farms, or nonprofit organizations.

Questions 5a-c – NOT APPLICABLE

6. Low/Mod Job Activities – for economic development activities undertaken where jobs were made available but not taken by low- or moderate-income persons
  - a. Describe actions taken by grantee and businesses to ensure first consideration was or will be given to low/mod persons.
  - b. List by job title of all the permanent jobs created/retained and those that were made available to low/mod persons.
  - c. If any of jobs claimed as being available to low/mod persons require special skill, work experience, or education, provide a description of steps being taken or that will be taken to provide such skills, experience, or education.

Question 6a-c: NOT APPLICABLE

7. Low/Mod Limited Clientele Activities – for activities not falling within one of the categories of presumed limited clientele low and moderate income benefit
  - a. Describe how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of whom are low- and moderate-income.

100% of all activities fell within one of the categories of presumed limited clientele.

8. Program income received
  - a. Detail the amount of program income reported that was returned to each individual revolving fund, e.g., housing rehabilitation, economic development, or other type of revolving fund.
  - b. Detail the amount repaid on each float-funded activity.
  - c. Detail all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other.

- d. Detail the amount of income received from the sale of property by parcel.

No Program Income was received during the FY 2010-2011

9. Prior period adjustments – where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:
  - a. The activity name and number as shown in IDIS;
  - b. The program year(s) in which the expenditure(s) for the disallowed activity(ies) was reported;
  - c. The amount returned to line-of-credit or program account; and
  - d. Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

No Prior period adjustments were made during the FY 2010-2011

10. Loans and other receivables
  - a. List the principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.
  - b. List the total number of other loans outstanding and the principal balance owed as of the end of the reporting period.
  - c. List separately the total number of outstanding loans that are deferred or forgivable, the principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.
  - d. Detail the total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.
  - e. Provide a List of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.

Question 10a-e: NOT APPLICABLE

11. Lump sum agreements
  - a. Provide the name of the financial institution.
  - b. Provide the date the funds were deposited.
  - c. Provide the date the use of funds commenced.
  - d. Provide the percentage of funds disbursed within 180 days of deposit in the institution.

Question 11a-d: NOT APPLICABLE

12. Housing Rehabilitation – for each type of rehabilitation program for which projects/units were reported as completed during the program year
  - a. Identify the type of program and number of projects/units completed for each program.

During the 2010-2011 reporting period approximately \$426,477 was spent to rehabilitate over 115 housing units. This work was accomplished by several

non-profits: Rebuilding Together, Disability Service and Legal Center and PEP Housing.

- b. Provide the total CDBG funds involved in the program.

\$176,477 of CDBG funds were included in the rehabilitation.

- c. Detail other public and private funds involved in the project.

Other funds included in the rehabilitation of the above units were Low/Mod Housing funds of \$250,000.

13. Neighborhood Revitalization Strategies – for grantees that have HUD-approved neighborhood revitalization strategies

- a. Describe progress against benchmarks for the program year. For grantees with Federally-designated EZs or ECs that received HUD approval for a neighborhood revitalization strategy, reports that are required as part of the EZ/EC process shall suffice for purposes of reporting progress.

Question 13a – NOT APPLICABLE

## 17. Antipoverty Strategy

1. Describe actions taken during the last year to reduce the number of persons living below the poverty level.

According to the 2000 Census the number of people under the poverty level in Petaluma is 3,712 which is 7% of the population. Our strategy for reducing the number of persons below the poverty level (to the limited extent that a city with our sources is capable), is covered in the 2010-2015 Consolidated Plan (91.21 (5H)).

## 18. Non-homeless Special Needs

Identify actions taken to address special needs of persons that are not homeless but require supportive housing, (including persons with HIV/AIDS and their families).

### *Elderly & Frail Elderly Housing*

- Rebuilding Together
- PEP Housing
- Disability Service and Legal Center (DSLCL)
- PPSC Frail Elder Facility

### Disabled Housing

- DSLCL
- Boulevard Apartments - Buckelew Programs- HUD 811
- Salishan Apartments – HUD 811

## 19. Specific HOPWA Objectives

\*Please also refer to the HOPWA Table in the Needs.xls workbook.

1. Overall Assessment of Relationship of HOPWA Funds to Goals and Objectives  
Grantees should demonstrate through the CAPER and related IDIS reports the progress they are making at accomplishing identified goals and objectives with HOPWA funding. Grantees should demonstrate:
  - a. That progress is being made toward meeting the HOPWA goal for providing affordable housing using HOPWA funds and other resources for persons with HIV/AIDS and their families through a comprehensive community plan;
  - b. That community-wide HIV/AIDS housing strategies are meeting HUD's national goal of increasing the availability of decent, safe, and affordable housing for low-income persons living with HIV/AIDS;
  - c. That community partnerships between State and local governments and community-based non-profits are creating models and innovative strategies to serve the housing and related supportive service needs of persons living with HIV/AIDS and their families;
  - d. That through community-wide strategies Federal, State, local, and other resources are matched with HOPWA funding to create comprehensive housing strategies;
  - e. That community strategies produce and support actual units of housing for persons living with HIV/AIDS; and finally,
  - f. That community strategies identify and supply related supportive services in conjunction with housing to ensure the needs of persons living with HIV/AIDS and their families are met.
  
2. This should be accomplished by providing an executive summary (1-5 pages) that includes:
  - a. Grantee Narrative
    - i. Grantee and Community Overview
      - (1) A brief description of your organization, the area of service, the name of each project sponsor and a broad overview of the range/type of housing activities and related services
      - (2) How grant management oversight of project sponsor activities is conducted and how project sponsors are selected
      - (3) A description of the local jurisdiction, its need, and the estimated number of persons living with HIV/AIDS
      - (4) A brief description of the planning and public consultations involved in the use of HOPWA funds including reference to any appropriate planning document or advisory body
      - (5) What other resources were used in conjunction with HOPWA funded activities, including cash resources and in-kind contributions, such as the value of services or materials provided by volunteers or by other individuals or organizations
      - (6) Collaborative efforts with related programs including coordination and planning with clients, advocates, Ryan White CARE Act planning bodies, AIDS Drug Assistance Programs, homeless assistance programs, or other efforts that assist persons living with HIV/AIDS and their families.
  
    - ii. Project Accomplishment Overview

- (1) A brief summary of all housing activities broken down by three types: emergency or short-term rent, mortgage or utility payments to prevent homelessness; rental assistance; facility based housing, including development cost, operating cost for those facilities and community residences
  - (2) The number of units of housing which have been created through acquisition, rehabilitation, or new construction since 1993 with any HOPWA funds
  - (3) A brief description of any unique supportive service or other service delivery models or efforts
  - (4) Any other accomplishments recognized in your community due to the use of HOPWA funds, including any projects in developmental stages that are not operational.
- iii. Barriers or Trends Overview
- (1) Describe any barriers encountered, actions in response to barriers, and recommendations for program improvement
  - (2) Trends you expect your community to face in meeting the needs of persons with HIV/AIDS, and
  - (3) Any other information you feel may be important as you look at providing services to persons with HIV/AIDS in the next 5-10 years
- b. Accomplishment Data
- i. Completion of CAPER Performance Chart 1 of Actual Performance in the provision of housing (Table II-1 to be submitted with CAPER).
  - ii. Completion of CAPER Performance Chart 2 of Comparison to Planned Housing Actions (Table II-2 to be submitted with CAPER).

## **CITY IS NOT A RECIPIENT OF HOPWA FUNDING**

### OTHER NARRATIVE

Include any CAPER information that was not covered by narratives in any other section.

The City of Petaluma's CDBG entitlement is modest, but provides great results for our low-income, elderly, and disabled population by leveraging our entitlement allocation.