

**2018
Consolidated
Annual
Performance
and
Evaluation
Report**



**City of Missoula,
Montana**

**The annual report of housing,
economic development, public
facility, and human service
programs funded by the U.S.
Department of Housing and
Urban Development (HUD).**

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CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)

This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

Missoula's Office of Housing & Community Development (HCD) funded 9 projects in PY2018. During the program year, the City of Missoula and its CDBG and HOME partners made great strides in achieving the goals of the 2014-2018 strategic plan. In total, the City of Missoula and its partners leveraged HUD and non-HUD resources to work towards creating 6 new homeownership units for low-income Missoulians, developing 200 units of new affordable rental housing for low-income Missoulians, and developing a new domestic violence and homeless family shelter that will serve thousands of families each year once fully constructed. HCD also worked towards connected a 31-home resident-owned manufactured home community to Missoula Water. Once complete, this project will ensure these low-income residents will have access to safe, high-quality water infrastructure.

In PY2018 HCD also partnered with nonprofit service providers to provide 2,358 homeless individuals with emergency shelter, connect 770 people with public services focused on financial and renter education, and ensure that 509 low-income aging Missoulians were able to successfully transition home after hospital stays.

In total, over 3,500 individuals directly benefitted from activities completed in program year 2018, and scores of additional Missoula residents have benefitted as the City and its partners continue to foster a strong and vibrant community for all.

Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual

outcomes/outputs, and percentage completed for each of the grantee's program year goals.

Table 1 - Accomplishments – Program Year & Strategic Plan to Date

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Goal 1 - Homelessness	Homeless	CDBG: \$ / HOME: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	4000	6444	161.10%			
Goal 1 - Homelessness	Homeless	CDBG: \$ / HOME: \$	Homeless Person Overnight Shelter	Persons Assisted	0	252		3750	2358	62.88%
Goal 2 - Rental Housing	Affordable Housing	CDBG: \$ / HOME: \$	Rental units constructed	Household Housing Unit	20	8	40.00%	200	0	0.00%
Goal 2 - Rental Housing	Affordable Housing	CDBG: \$ / HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	100	111	111.00%			
Goal 2 - Rental Housing	Affordable Housing	CDBG: \$ / HOME: \$	Housing for People with HIV/AIDS added	Household Housing Unit	6	8	133.33%			

Goal 2 - Rental Housing	Affordable Housing	CDBG: \$ / HOME: \$	Other	Other	0	0		1	0	0.00%
Goal 3 - Homeownership	Affordable Housing	CDBG: \$ / HOME: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0		800	770	96.25%
Goal 3 - Homeownership	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Added	Household Housing Unit	6	0	0.00%	6	0	0.00%
Goal 3 - Homeownership	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	25	29	116.00%			
Goal 3 - Homeownership	Affordable Housing	CDBG: \$ / HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	40	0	0.00%			
Goal 4 - Public Improvements	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1500	6470	431.33%	31	5638	18,187.10%

Goal 4 - Public Improvements	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	Households Assisted	50	37	74.00%			
Goal 5 - Economic Development	Non-Housing Community Development Economic Development	CDBG: \$	Jobs created/retained	Jobs	20	0	0.00%			
Goal 5 - Economic Development	Non-Housing Community Development Economic Development	CDBG: \$	Businesses assisted	Businesses Assisted	15	0	0.00%			
Goal 6 - Sustainability and Environment	Housing and Neighborhoods	CDBG: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	20	0	0.00%			
Goal 7 - Affordable and Fair Housing	Affordable Housing Non-Homeless Special Needs Fair Housing	CDBG: \$	Other	Other	150	2	1.33%			
Goal 8 - Planning	Administration and Planning	CDBG: \$/ HOME: \$	Other	Other	1	5	500.00%	1	1	100.00%

Goal 9 - Public Services	Public Services	CDBG: \$ / HOME: \$0	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	15000	9253	61.69%	2910	2867	98.52%
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Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.

Program Year 2018 was the last program year of the City of Missoula's 2014-2018 Consolidated Plan. Over the five years of the Consolidated Plan, Missoula's CDBG-HOME investments had a far reach. The City exceeded its goals for Tenant-Based Rental Assistance (Goal 2 - Rental Housing), Homeowner Housing Rehabilitation (Goal 3 - Homeownership), and Homeless Public Services activities (Goal 1 - Homelessness). For the 2018 Program Year, the City and partners nearly met their goal to assist 800 homeowners in staying in their homes through the Care Transitions program (770/800) and almost achieved their goal of assisting 2,910 Missoulians through public service activities (2,867/2910). Several large projects funded for PY2018 were not completed in the program year, resulting in unmet goals as of this CAPER. The Villagio rental housing project is set to create 200 units of low-income housing for the City, the biggest rental housing project in the city's history. This complex project is still underway but not yet complete. Homeward's Small Homes project brought six new affordable homeownership units onto the market in 2019, but was not yet fully closed out as of this CAPER. Finally, the River Acres public improvement project will connect a 31-unit resident-owned manufactured home community with safe, reliable public water in 2020.

In PY2018 three projects funded in PY2017 were completed. Opportunity Resources, Inc.'s Benton Avenue public improvement project was completed and closed out, rehabbing 13 units in two four-plexes , which are home to long-term ORI clients with disabilities. The units were aging, energy-inefficient and presented many safety and quality of life challenges to residents before the project. The Eagle Watch Estates project also wrapped up in PY2018 rehabilitating an elevator in an apartment complex that serves Missoulians with disabilities. This provided improved facilities to the 24 households in that building. Lastly, Invest Health's sidewalk infrastructure improvements project was also completed in PY2018 providing one of Missoula's low-income neighborhoods with improved access to sidewalk infrastructure.

The City found in PY2016 that it was falling short in its jobs created and businesses assisted goals in the Consolidated Plan. The Missoula

community has a high functioning CDFI that provides small business loans targeted to entrepreneurship, local business growth, and business innovation. During the creation of our PY2016 Action Plan with technical assistance from HUD the City of Missoula amended our 5-year Consolidated Plan goals to remove Goal #5 - Economic Development. This has allowed us to better focus our limited resources and strategic investments. In total, Missoula exceeded goals related to its rental housing, homeownership, and homelessness priority areas while it lagged in other areas like economic development and sustainability and environment. This reflects strategic decisions in the most recent program years to focus CDBG and HOME dollars where they were needed most in the community, to address gaps in the overall community safety net systems.

CR-10 - Racial and Ethnic composition of families assisted

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

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

	CDBG	HOME
White	2,475	0
Black or African American	77	0
Asian	17	0
American Indian or American Native	379	0
Native Hawaiian or Other Pacific Islander	21	0
Total	2,969	0
Hispanic	118	0
Not Hispanic	2,851	0

Narrative

The Missoula area as a whole is (U.S. Census Bureau, 2016):

- 92% White
- 0.5% Black or African American
- 1.7% Asian
- 2.6% American Indian and Alaska Native
- 0.1% Native Hawaiian or Other Pacific Islander

Based on the above accomplishment data, beneficiaries of City administered CDBG projects in PY18 were 83% white, 12.7% American Indian or American Native, and 2.5% Black or African American. The City's new Consolidated Plan for HUD-Funded Programs for 2019-2023 examines demographic patterns and disproportionate impacts more thoroughly. For the purpose of this CAPER, the families assisted during the PY2018 program year mirror many of the housing and public service needs that tend to disproportionately affect people of color in Missoula as reflected in the above table.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Table 3 - Resources Made Available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	647,661	306,434
HOME	public - federal	848,303	265,112

Narrative

In order to determine the amount expended during Program Year 2018, the City of Missoula referred to the PR-07 Drawdown Report by Voucher. In PY2018 the City of Missoula allocated \$647,661 to CDBG activities and expended \$306,434 during PY2018. As of the close of PY2018 two large projects funded with CDBG were behind schedule and still in process of completion. NeighborWorks Montana's River Acres Water Connection project as of the end of PY2018 had not yet begun work and as a result has drawn \$0.00 in funds at the close of the program year. Additionally, YWCA Missoula's facility expansion, called "Meadowlark" had also not begun construction as of the end of PY2018 and therefore had drawn \$0.00 at the end of the program year. Both projects are large-scale infrastructure and community public improvement projects and therefore tend to take longer to complete; the City expects that CDBG funds will be expended in a timely manner in PY2019.

In PY2018 the City of Missoula allocated \$848,303 to HOME activities and expended \$65,112. Homeward's Small Homes project, a relatively complicated housing development project, was nearing completion at the close of PY2018, with all units placed and constructed and some units sold. The Human Resource Council's Tenant-Based Rental Assistance project had drawn down all of its funds at the close of PY2018.

Identify the geographic distribution and location of investments

Table 4 – Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
City of Missoula	100	100	City limits

Narrative

100% of CDBG and HOME funds were expended for activities in the City of Missoula.

Leveraging

Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.

The City of Missoula's HOME and CDBG investments leveraged a total of \$26,242,639.00 in additional funds during PY2018. Of this amount, \$64,000 came from Missoula County funds, \$630,000 came from City of Missoula funds, \$1,797,737 came from foundations, and \$15,184,788 came from tax credits or tax credit equity. The remaining \$8,566,114 came from private sources.

The City of Missoula calculated the match liability for FFY18 through the PR-33 HOME Matching Liability Report, which demonstrated a required match percentage of 25% which means that the City's HOME match liability for FFY18 was \$87,888.63. The HOME match of \$590,734.00 was contributed during Federal Fiscal Year 2018 (FFY18) from Homeward's Small Manufactured Homes project in the form of developer fee foregone and cash from the sale of several of the small homes.

During PY2018 no publicly owned land or property located within the jurisdiction was used to address the needs identified in the plan.

Table 5 – Fiscal Year Summary - HOME Match Report

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	4,452,517
2. Match contributed during current Federal fiscal year	590,734
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	5,043,251
4. Match liability for current Federal fiscal year	87,888
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	4,955,363

Table 6 – Match Contribution for the Federal Fiscal Year

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match
446	06/30/2019	590,734	0	0	0	0	0	0

HOME MBE/WBE report

Table 7 – Program Income

Program Income – Enter the program amounts for the reporting period				
Balance on hand at begin-ning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
600	233,721.90	400.02	0	\$233,321.88

Table 8 - Minority Business and Women Business Enterprises

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period						
	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Contracts						
Dollar Amount	2,121,852	0	0	0	0	2,121,852
Number	13	0	0	0	0	13
Sub-Contracts						
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0
	Total	Women Business Enterprises	Male			
Contracts						
Dollar Amount	2,121,882	294	2,121,588			
Number	13	2	11			
Sub-Contracts						
Number	0	0	0			
Dollar Amount	0	0	0			

Table 9 – Minority Owners of Rental Property

Minority Owners of Rental Property – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

Table 10 – Relocation and Real Property Acquisition

Relocation and Real Property Acquisition – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
Parcels Acquired		0		0		
Businesses Displaced		0		0		
Nonprofit Organizations Displaced		0		0		
Households Temporarily Relocated, not Displaced		0		0		
Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

Table 11 – Number of Households

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	0	0
Number of Non-Homeless households to be provided affordable housing units	596	509
Number of Special-Needs households to be provided affordable housing units	0	37
Total	596	546

Table 12 – Number of Households Supported

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	0
Number of households supported through The Production of New Units	206	0
Number of households supported through Rehab of Existing Units	0	0
Number of households supported through Acquisition of Existing Units	0	0
Total	206	0

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

The City of Missoula also continued to support the Coordinated Entry System (CES) in PY2018 that benefits homeless people in their efforts to obtain affordable housing. Homeward's Financial and Renter Education helps provide knowledge to low-income renter households to improve their financial management skills and make their housing more affordable.

Number of Non-homeless households to be provided affordable housing units: The City set out to support 596 non-homeless households in PY2018 through four projects. Two CDBG projects, River Acres (30 households) and Missoula Aging Services' Care Transitions (360 households) aimed to support non-homeless individuals by connecting a resident-owned community to city water, enabling those households to remain in their homes and by supporting aging Missoulians in transitioning back to their homes after hospital stays. Both of these projects wrapped up in the program year, serving 509 households.

Number of Special-needs to be provided affordable housing units: The City aimed to support 37 special-needs households by funding improvements to the Opportunity Resources Benton Ave. facility and Montana Mobility Impaired Housing elevator project for Eagle Watch Estates in PY2017. These projects were completed in Program Year 2018, fulfilling that goal.

Number of households supported through The Production of New Units: Two HOME projects, Homeward's Small Homes (6 households) and the Villagio development (200 households) planned to create new units. Neither of these projects wrapped up during the program year, but are expected to be complete by the end of PY2019.

Discuss how these outcomes will impact future annual action plans.

On June 24, 2019 the city of Missoula passed a comprehensive housing policy that outlined specific strategies aimed at creating and preserving affordable housing. These strategies included creating a LIHTC support program, preserving expiring use projects, support the conversion of mobile home parks into resident owned communities, creating homeowner rehabilitation loan programs, and expanding our current homeowner assistance programs. They also included a recommendation for increase support to partner organizations engaging in rental and homeowner education, eviction prevention work, and supportive services that help stabilize at risk populations in their housing. The outcomes of new units associated with the City's CDBG and HOME funds support that Housing Policy, and vice versa.

Additionally, the City of Missoula continues to support of Missoula's Coordinated Entry System (CES), which closely correlates to the 2019-2023 Consolidated Planning goals. The City of Missoula Office of Housing & Community Development (HCD) provides leadership and support to the Reaching Home Coordinator, who directs the City of Missoula's 10-year plan to end homelessness.

Thanks to the great work of the Reaching Home Coordinator and multiple nonprofit service providers, the City launched a new CES in June of 2017. CES conforms to HUD guidance and features a vulnerability assessment and weekly case conferencing to ensure that those homeless households with the most significant barriers to housing are receiving the support and assistance they need to obtain permanent, affordable housing.

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

the eligibility of the activity.

Table 13 – Number of Households Served

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	156	0
Low-income	127	0
Moderate-income	195	0
Total	478	0

Narrative Information

Homeward's Financial Education program is the only project funded in PY2018 in the area of affordable housing for which information on income by family size is required to determine the eligibility of the activity and is tracked by number of households served. The accomplishment data for that project is reflected in the table above.

Households with worst case needs are defined as very low-income renters who do not receive government housing assistance and who paid more than one-half of their income for rent, lived in severely inadequate conditions, or both. According to the City of Missoula's Consolidated Plan (2019-2023), 20% of Missoulians spend more than 50% of their income on housing, or over 14,000 Missoulians. Also according to the Consolidated Plan, Missoulians at 0% to 30% AMI tend to have disproportionate severe housing problems (lacking complete kitchen facilities, lacking complete plumbing facilities, more than 1.5 persons per room, or a cost burden when housing costs are greater than 50% of the household income). Each year, the City of Missoula, which faces a lack of affordable housing stock, works to bring new units to the Missoula housing market through the deployment of HUD funds. The City also supports the existing network of service providers dedicated to serving those with worst case needs. This is reflected in the discussion above related to PY2018's goals and outcomes.

CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)
Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

In PY2018 the City provided support to the YWCA's Ada's Place Emergency Shelter, which provided emergency housing support and case management to 199 homeless persons during the program year. While not directly funded by CDBG during PY2018, the Poverello Center's Homeless Outreach Team (HOT) conducts daily outreach to homeless persons and collaborates extensively with multiple agencies across Missoula in order to assess needs and align resources. Additionally, the Open Aid Alliance continued its local outreach services through their Coordinated Outreach Team. These individuals work to connect vulnerable populations with permanent supportive housing through a harm reduction approach. Each of these agencies coordinate with the City closely through the Missoula Coordinated Entry System (CES).

Throughout PY2018, the City of Missoula continued to lead efforts surrounding the CES, overseen by the Reaching Home Coordinator. Reaching Home is Missoula's 10-Year Plan to End Homelessness and represents a collaborative effort between the City of Missoula, Missoula County, and multiple non-profit partners. The CES consists of four front doors through which all referrals for homeless services are to be directed: the Poverello Center, the YWCA, 211 (operated by District XI Human Resource Council), and the Salvation Army. In addition, multiple other service providers are involved in CES. All referrals are added to a By-Name List and all organizations use a common assessment tool to gauge the vulnerability of each person. The CES team conducts weekly case conferencing to identify individual needs and vulnerabilities and appropriately designate community resources with the goal of housing homeless persons as quickly as possible. In an effort to engage as many homeless persons as possible, CES collaborates with the County Jail, emergency departments, police department, and homeless outreach teams to coordinate, locate and engage the unsheltered population.

Along with CES, the Missoula homelessness agencies have also launched a Diversion program. It is a requirement of the CES Front Doors to attempt diversion with every household that is requesting a shelter bed prior to completing the vulnerability assessment. These Front Doors are assisting households with identifying safe alternatives to entering the homeless crisis response system and providing information and resources. In the future, the City hopes to have a flexible fund to help divert households and also a diversion specialist that can follow up with diverted households to ensure they obtain permanent housing and avoid becoming homeless in the future.

In January of each year, ARHC organizes Project Community Connect, formerly Project Homeless Connect, which is a one-day, one-stop event aimed at connecting homeless persons (sheltered and unsheltered) and those at-risk of becoming homeless with core social services. In 2018, more than 150

community volunteers and 60 government agencies, non-profit providers, and local businesses came together to give direct services to 305 Missoulians.

Addressing the emergency shelter and transitional housing needs of homeless persons

During PY2018, the City of Missoula provided CDBG support for the YWCA's Ada's Place Emergency Shelter. This program provides one- to three-night emergency motel vouchers or 50-day motel stays to homeless families. In PY2018, the YWCA provided emergency housing to 199 homeless persons.

Furthermore, the YWCA provides case management in order to work with families to get them into permanent or transitional housing. The YWCA reports that 60% of families assisted through Ada's Place obtain either permanent or transitional housing. Of these families, 90% obtain permanent housing and 10% obtain transitional housing. In PY2018, the City of Missoula awarded funding for a YWCA facility expansion. YWCA Missoula proposes new construction of a 35,000 square foot, fully accessible building to include 31 family housing rooms, and a 16-room Domestic Violence Shelter. The site is centrally located at 1800 S. Third Street West, within walking distance to schools, grocery stores, public transportation, and employment opportunities. The project will serve 100% LMI households and broke ground Fall 2019.

The Poverello Center is an emergency homeless shelter that received funding in PY2018 for several programs. The Poverello Center provides overnight shelter, hot meals, sack lunches, and access to services. In PY2018 the Poverello Centers Rapid Intake and Housing Retention project was funded. The Rapid Intake portion of the project provided immediate access to referrals and appropriate services with a focus on employment and housing. The Housing Retention portion allowed the organization to hire a Housing Retention Specialist to work with high barrier individuals and support them in retaining housing. The Poverello Center served 2,159 individuals in PY2018 through these programs.

In August of 2019, the Missoula County and the City of Missoula, along with development partners, announced our intent to develop a 202 unit scattered site LIHTC development to serve individuals and families in our community with high barriers to obtaining housing, including those re-entering our community from the correctional system. This project is made possible through a 4 acre land donation by Missoula County.

Additionally, in PY2018, HCD worked on a Corporation for Supportive Housing (CSH) Frequent Users Systems Engagement (FUSE) project. CSH FUSE is a proven model identifying frequent users of jails, shelters, hospitals and/or other crisis public services and then improving their lives through supportive housing. Supportive housing is an evidence-based solution that leads to better health and other good outcomes for people homeless and disabled. Tenants are provided affordable housing with wraparound support services, which stabilizes their lives and significantly reduces returns to jail and homelessness, reliance on emergency health services, and improves overall quality of life. The collaborative applied for funding from the Montana Health Care Foundation (MHCF) in PY2018 to fund a pilot of the service delivery model for mobile services.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

In PY2018 the City funded Missoula Aging Services' Care Transitions program, which provided direct supports to low-income seniors transitioning home from long hospital stays. This program supported 509 individuals in their transition home, helping to ensure they were able to remain at home during that difficult time.

Missoula's At-Risk Housing Coalition (ARHC) convenes and monitors the Winter Shelter program that operates each December through April with the mission of keeping people housed during the coldest winter months by providing rental assistance to those at-risk of homelessness. A committee comprised of ARHC members from four agencies screens applications for Winter Shelter funds and selects recipients. The Winter Shelter program coordinates rental assistance efforts to most efficiently leverage resources for those at-risk of homelessness.

Missoula's community mental health center, Western Montana Mental Health Center (WMMHC) has a specific certified Mental Health Professional that coordinates discharges with the Montana State Hospital and attends the Admission and Discharge Review Team (ADRT) meeting every other month; this also allows for meeting with prospective and established clients face-to-face at the State Hospital.

Locally, WMMHC also coordinates discharges with Missoula's two hospitals: St. Patrick Hospital and Community Medical Center. WMMHC also employs several staff at the Missoula County Detention Facility and they specifically have a case manager that completes discharge planning at the jail. This person also works with households after they are released for up to 90 days in attempt to reduce recidivism.

Missoula has two part-time Community Liaison Outreach Specialists funded through the Department of Public Health and Human Services. They provide transitional support to individuals with mental illness being discharged from the Montana State Hospital and into services offered in our community. St. Patrick Hospital is coordinating with the Montana State Hospital to receive signed releases of information for patients being conditionally released; this helps ensure that if/when the recently released patient is seeking services in the emergency department, the staff have some background information.

Partners for Reintegration (PFR), a sub-committee under ARHC, is a community coalition focused on improving reentry for returning citizens. Safe, affordable housing is the current biggest difficulty facing

returning citizens from both state and county facilities, and also affects their families and children. PFR's close working relationship with ARHC benefits both organizations and can increase community safety and success in reintegration. PFR has been active for four years and is supported by over 300 people, as reflected in their mailing list. This includes returning citizens, probation and parole, attorneys, individuals in private practice as well as agencies already involved in ARHC.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

In August 2019, the Missoula County and the City of Missoula, along with development partners, announced our intent to develop a 202 unit scattered site LIHTC development to serve individuals and families in our community with high barriers to obtaining housing, including those re-entering our community from the correctional system. This project is made possible through a 4 acre land donation by Missoula County.

Also in PY2018, HCD worked with the Missoula FUSE Collaborative to pursue a three-phased project to provide housing and wrap around services to 53 identified frequent utilizers of jails, shelters, and hospitals. This three-phase approach implements a scattered site housing model with mobile services; a cluster site housing model with on-site and mobile services; and a stand-alone facility that incorporates housing with on-site medical and behavioral health services. The project applied for funding from the Montana Health Care Foundation (MHCF) to fund a pilot of the service delivery model for mobile services.

The YWCA administers a rapid rehousing program that provides rapid re-housing assistance and case management to homeless families in Missoula who are living on the street, in emergency shelters, or who are fleeing domestic violence. Priority placement is given to chronically homeless families. Short-term (up to 2 months), and/or medium-term (up to 6 months), tenant-based rental assistance and support services were provided to participating families, depending on their needs.

The YWCA rapid re-housing program works in coordination with the HRC Emergency Solutions Grant (ESG) rapid re-housing program, the HRC TBRA program, the WORD TBRA program, and the Salvation Army Emergency Winter Shelter program to connect eligible individuals and families with the most appropriate forms of housing assistance. An ARHC review committee, staffed by the aforementioned agencies, is responsible for soliciting and reviewing individual applications for housing assistance that will prevent homelessness. For example the county-funded Winter Shelter program run by the Salvation Army between November and April provides assistance with utility bills in the coldest winter months.

In Missoula, ESG funding is awarded directly to the HRC. The ESG rapid re-housing (RRH) program was

used to provide homeless individuals in a three-county area with any of the following forms of assistance: one to three months of rental assistance, a rental security deposit equal to no more than two months' rent, last months' rent, a utility security deposit, rental application fees, utility payments, utility arrears up to six months, and arrears from a prior rental. The ESG RRH program targeted individuals who met the literally homeless definition (at a homeless shelter, place not meant for human habitation, hotel if paid for by charitable organization and transitional housing if they were homeless at the time of entry).

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

Actions taken to address the needs of public housing

The City of Missoula Office of Housing & Community Development (HCD) participated in meetings with the Missoula Housing Authority (MHA) to discuss their needs going forward in PY2018 and continues to be in close contact with MHA to provide support as needed. In July 2018 Missoula Housing Authority converted the application process for Public Housing and Housing Choice Vouchers from a paper application to online applications, making it easier and much more convenient for people to apply.

Major upgrades to siding, windows, kitchens, bathrooms, and flooring in about 20 properties are scheduled to be completed in 2019. Interior work will be scheduled in vacant units, minimizing the disruption to tenants. Also scheduled for 2019 is the development of a new 200-unit affordable housing complex which will include 24 units of project-based vouchers, allowing the project to reach down to lower income levels than would be possible without the vouchers. That project is expected to break ground in PY2019.

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

The Resident Advisory Board of the Missoula Housing Authority meets once a year and advises staff and the Board of Commissioners on policies of interest to them. MHA has had for many years a Housing Choice Voucher Homeownership program which is open to voucher and public housing program participants. Residents are offered the services of ROSS (Resident Opportunities and Self-Sufficiency) and FSS (Family Self-Sufficiency) Coordinators. A key component of the Public Housing FSS program are the escrow accounts made available to families, many of whom utilize these funds for homeownership. As of the close of PY2018, three families had graduated the PH FSS program and escrow balances at the time of graduation were \$10,229, \$8,967, and \$2,251. Twenty-two families have escrow accounts established with 20 families making monthly deposits. The average increase in earned income was \$8,880 during the program year and monthly escrow deposits totaled \$6,120. In all, 47 families were served in PH FSS during the year, including 10 new families. PH FSS escrow accounts totaled \$78,374 at the close of PY2018.

Actions taken to provide assistance to troubled PHAs

The Missoula Housing Authority is not a troubled PHA.

CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)

Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)

On June 24, 2019, the City of Missoula passed a comprehensive housing policy that outlined specific strategies aimed at creating and preserving affordable housing. These strategies included creating a LIHTC support program, preserving expiring use projects, support the conversion of mobile home parks into resident owned communities, creating homeowner rehabilitation loan programs, and expanding our current homeowner assistance programs. They also included a recommendation for increase support to partner organizations engaging in rental and homeowner education, eviction prevention work, and supportive services that help stabilize at risk populations in their housing.

A significant section of the Housing Policy, titled "Reduce Barriers to New Supply and Promote Access to Affordable Homes" focuses on creating an affordable housing incentive program, amending city code to include formal land use incentives for producing below-market rental and ownership homes, and pursuing changes to the general land use code to reduce development costs in Missoula. As of July 2019 the City is working on revising its Zoning Code (Title 20) to enact many of the changes recommended in the Housing Policy.

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

One of the most pressing underserved needs in the Missoula community is affordable housing. As a result, the Office of Housing & Community Development has narrowed its focus in recent years to producing more units, preserving existing affordable units, and providing supports to housing consumers. This focus was supported by the results of the 2018 Community Needs Assessment, in which "increase housing that is affordable to all income levels" was selected as the highest priority by respondents to the online survey.

In PY2018, HCD and its partners took several actions to address the obstacles to creating more housing that is affordable for Missoulians:

- HCD continued to support the project team led by the Missoula Housing Authority as they worked on the Villagio rental housing project, which is expected to break ground in 2020.
- Homeward finished construction on their five Small Homes, which provide affordable homeownership opportunities to low-income Missoulians. They continue to work on selling the homes in PY19.
- Homeward served 770 Missoulians through their financial, renter, and homeownership classes and counseling. These classes helped Missoulians prepare for homeownership, be savvy renters, and plan for financial success.

- Neighborworks Montana continued work on River Acres project, which plans to connect 30 manufactured homes in a resident-owned community to City Water, ensuring sustainable and affordable water for the community moving forward.

Additionally, HCD took several actions to support those facing homelessness in Missoula:

- The YWCA operated their Ada's Place Emergency Housing program for Missoula's homeless families.
- The Poverello Center solidified the Housing Retention Specialist role, supporting individuals with high barriers to stable housing remain housed.
- Missoula Aging Services supported over 500 aging Missoulians transition successfully back home after hospital stays.
- The YWCA made progress on their new facility project, which will serve homeless families and those fleeing domestic violence. The project broke ground in August 2019.

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

The City of Missoula works to address LBP hazards as applicable on any city project. This includes new construction on sites that require site contamination cleanup (using Brownfields funds), homeownership rehabilitation projects, and down payment assistance loans. All homeowner rehabilitation or rental assistance projects funded through the City's HOME or CDBG programs require that units constructed prior to 1978 must pass a visual inspection for lead-based paint (LBP) by certified LBP inspectors. Owners or managers are required to complete a disclosure certification of their knowledge of the use of LBP in the unit, potential tenants or buyers are provided a brochure outlining LBP hazards, and a Lead Warning Statement is attached to the rental lease or home purchase documents. If required, mitigation procedures must be successfully completed prior to occupancy and a second inspection is done to verify compliance. If the owner/landlord is unwilling to abate identified LBP hazards, the assisted client is directed to find another unit.

In addition, the Missoula City-County Health Department provides lead testing upon request and provides brochures and a video about the hazards of lead in paint and other materials.

In PY2018, Homeward's Small Homes project brought five new homeownership opportunities without any lead-based paint hazards onto the Missoula market and the Villagio project will soon provide 200 affordable rental homes without any lead-based paint hazards.

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

The City of Missoula's Housing Policy, passed in June 2019 is focused on creating more affordable home options for Missoulians. By passing housing policy, HCD worked in PY2018 to reduce the number of poverty-level families by making progress in the realm of affordable housing, which can create stability and remove financial strains on poverty-level Missoulians.

The City of Missoula provided CDBG support to Homeword, Inc.'s Financial and Renter Education and Counseling program. The purpose of this program is to help low-income families - many of whom are experiencing poverty - to better understand their finances and develop a plan to improve their financial condition. This education and counseling program benefitted 478 low-income individuals in PY2018, including 156 extremely low-income persons. While CDBG-HOME construction projects did not result in the creation of new jobs or contracts for Section 3 business concerns or residents, the City of Missoula did take steps to encourage participation by Section 3 residents including posting legal advertisements in the Missoulian.

A key to Missoula's strategy to reduce the number of poverty-level families is to increase job opportunities for low-income persons. While the City did not support any economic development initiatives with CDBG or HOME in PY 2018, the City does support the Missoula Economic Partnership (MEP), which works collaboratively and strategically to facilitate increased prosperity through business development while enhancing the business environment and quality of life in our community. MEP works with business owners on plans for their growth and job creation and assists them in applying for Big Sky Economic Development Trust Fund grants, which provide expansion grant funds tied to job creation.

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

The Office of Housing and Community Development (HCD) reached a major milestone in PY2018 with the passage of the first comprehensive city housing policy in over 20 years. This housing policy provides a new roadmap for HCD that complements the 2019-2023 Consolidated Plan for HUD-funded programs. It also adds a significant workload to HCD. In addition, two other City Departments were added to HCD in PY2018: Energy and Climate Action and the Department of Neighborhoods. With all of these expanded duties and focus areas, HCD will continue to work towards building capacity in PY2019 and refining the institutional structure of the office as well as its place within the City.

In PY2018 the Office of Housing and Community Development continued to operate in close partnership with other City departments, include the Missoula Redevelopment Agency, the Mayor's Office, and Development Services. The collaborations further develop institutional structure by increasing the expertise and resource of our department. Internally, our department continues to develop expertise by attending relevant trainings and professional development opportunities. In PY2018 our staff members attended the following training opportunities: The National Development Council's Housing Development Finance Professional Certification Program, HUD Regional Grantee Trainings, Statewide Housing and Healthcare Summit, Brownfields National Conference, Continuum of Care Professional Leadership Curriculum, and Crisis Intervention Training (CIT) International.

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

In PY2018 the Office of Housing and Community Development led the city through a collaborative and

community-driven process to create the City's first comprehensive housing policy in over 20 years. Passed in June 2019, the housing policy was the result of nearly two years of research, partner engagement, public outreach, and community work groups. As HCD now moves into the implementation phase of housing policy, we will continue to engage our public and private housing and social service partners.

HCD also continued to lead the Missoula Coordinated Entry System (CES) in PY2018. The City of Missoula provides leadership of the At-Risk Housing Coalition (ARHC), which, since 1993, brings together public and private housing and social service organizations to develop solutions to combat homelessness. ARHC serves as the platform for CES in Missoula.

Additionally, HCD organized a Community Needs Assessment on November 15, 2018 and a CDBG-HOME application workshop on January 8, 2019. Both of these meetings were opportunities for public and private housing and social service agencies to learn more about funding opportunities through CDBG and HOME, but also to discuss their programs with one another and identify new opportunities for collaboration. Over 30 community leaders, government agency representatives, nonprofit agency representatives, and residents participated in the Community Needs Assessment Meeting and nearly 20 community partners attended the application workshop.

Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)

The Office of Housing and Community Development (HCD) continued to engage in PY2018 in a statewide effort shared between entitlement communities, the state of Montana (Montana Department of Commerce) and disseminated by the U.S. Department of Housing and Urban Development (HUD) to create a new Analysis of Impediments. This document looks at data, goals, and needs of the participating entitlement communities in the context of fair housing. This document is about identifying and analyzing impediments to fair (i.e. non-discriminatory, affordable) housing for community members and making steps toward reducing those obstacles. The AI aims to improve local planning and fair housing availability.

In the absence of a new AI, HCD continues to refer to the 2014 Analysis of Impediments. The City of Missoula's new Housing Policy, entitled "A Place to Call Home: Meeting Missoula's Housing Needs" addresses nearly all of the impediments identified in the 2014 AI by calling for a zoning audit, several zoning and code changes, and by creating a set of incentives for more affordable housing development.

CR-40 - Monitoring 91.220 and 91.230

Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

Each year, the City of Missoula Office of Housing and Community Development (HCD) will develop a monitoring plan for both CDBG and HOME. Monitoring will take various forms ranging from desk reviews to on-site monitoring visits. HCD will utilize a risk analysis tool in order to identify those CDBG subrecipients that may require more in-depth and on-site monitoring. HCD staff utilizes Chapter 5 of the Managing CDBG guidebook as guidance for CDBG monitoring as well as the CPD Monitoring Handbook.

In accordance with HOME guidance found in Monitoring HOME, HCD will utilize the following on-site monitoring schedule for HOME-assisted activities:

For any activity administered by a subrecipient, while contract is in effect: Annually

- Tenant-based rental activity: Annually
- Project development activities during all phases of the project through to occupancy and project completion; provided that development has begun: At least annually, but may occur more frequently
- Post completion, for rental projects with 1-4 total units in the project: Every 3 years until period of affordability expires
- Post completion, for rental projects with 5-25 total units in the project: Every 2 years until period of affordability expires
- Post- completion, for rental projects with 26 or more total units in the project: Annually until period of affordability expires

HCD utilizes the Monitoring HOME guidebook as well as the CPD Monitoring Handbook as guidance for monitoring. For both CDBG and HOME on-site monitoring, HCD issues a written report to the Subrecipient and allows them an opportunity to respond to any of the observations, findings, or deficiencies. With respect to minority and women-owned business outreach, Section 3, labor standards, and other federal requirements tied to construction projects, HCD staff conducts pre-construction meetings with CDBG-HOME subrecipients to ensure that they are familiar with all requirements and have the required documents and forms to include in bid and construction documents.

Throughout the year, HCD staff are reviewing draw requests, demographic reports, and narrative and financial reports to review CDBG and HOME-funded projects for compliance with all applicable federal regulations. If HCD identifies any issues as part of this review, staff promptly notifies the Subrecipient to discuss the issue and identify any necessary corrective actions.

Citizen Participation Plan 91.105(d); 91.115(d)

Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.

In preparing the Consolidated Annual Performance and Evaluation Report (CAPER), the City contacted and informed all organizations located in or working in Missoula that fit the following descriptions: Public and private agencies that provide housing, health, and social services including those that provide services to children, the elderly, persons with disabilities, persons living with HIV/AIDS, people with substance and chemical abuse issues, victims of domestic violence, and persons who are homeless; State and local health and child welfare agencies (regarding lead-based paint); units of local government including City and County planning agencies; appropriate offices of state government; local neighborhood and citizen groups; and, the Missoula Housing Authority and residents of public and subsidized housing.

Additionally, HCD initiated the following actions: took steps to encourage participation by low- and moderate-income persons, particularly those living in areas where CDBG or HOME funds are proposed to be used; and, took steps to encourage the participation of all of its citizens including minorities and non-English speaking persons, and persons with disabilities. These actions were conveyed in the public legal notice printed in the regional newspaper and distributed to the above organizations or interest lists, and particularly offered assistance to persons who were non-English speaking, or needed accommodations for disabilities.

Standards for public notice

Notice was provided to the public via email and was published twice in the publication designated by the City of Missoula for legal notices at least two consecutive weeks prior to the deadline. For the CAPER, no public hearing is required. Notices were sufficiently detailed to allow for citizens to identify and have access to recognized programs or services and provided information listing the locations at which complete copies of any plans or reports can be found (City Hall, HCD website, by email, etc.). As a matter of policy, public meetings are held at times and locations convenient to potential beneficiaries and in a facility that is physically accessible to persons with disabilities.

Per the actions taken in outreach efforts above, members of the public were asked to review and comment on the draft Annual Performance Report. The City provided public notice to include a brief summary of the uses of funds included in the Performance Report and accepted written public comment as described in Standards for Public Notice above. A summary of written comments received is included in the final version of the Performance Report. In the City's advertisements for the CAPER it is offered to provide the CAPER in alternative formats (e.g. large print) and the use of the 711 Montana Relay service. Persons with disabilities are invited to request assistance in order to participate in meetings or access to programs. HCD posts all items on the City's website.

CR-45 - CDBG 91.520(c)

Specify the nature of, and reasons for, any changes in the jurisdiction's program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.

The City was falling short in its jobs created and businesses assisted goals identified in the Consolidated Plan as of PY2016. The Missoula community has a high functioning CDFI that provides small business loans targeted to entrepreneurship, local business growth, and business innovation. Additionally, we have strong partners in the private and public sectors that are providing worker education and skill enhancement. During the creation of our PY16 Action Plan and with technical assistance from HUD the City of Missoula amended our 5-year consolidated plan goals to remove Goal #5, as stated below. This has allowed us to better focus our limited resources and strategic investments in the remaining goals listed above.

- **Goal #5** - Economic Development. The City will promote economic development and invest in the Missoula workforce.
- **Outcome:** The City will support entrepreneurship, local business growth and business innovation, especially in the creation and maintenance of jobs that provide good-paying jobs that will maintain a safe, decent standard of living within the community. It will encourage worker education and skill enhancement that will strengthen the earning capacity of low- and moderate-income wage earners, and target specific areas for re-investment in order to produce a neighborhood impact. Other activities will include coordinating economic development needs with needs in other areas (housing, human services, public facilities/infrastructure) and in other regions; and developing transportation options for the community's workforce.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.

CR-50 - HOME 91.520(d)

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

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

In FY18 (HUD Program Year 2017) the City of Missoula Office of Housing & Community Development (HCD) assessed the need for monitoring projects using HUD guidance. Given the intermittent nature of on-site monitoring for HOME rental properties, we determined on-site monitoring was necessary for all four active HOME Rental Projects: MHA Garden District, Homeword Sweetgrass Commons, Homeword Solstice, and Homeword Equinox.

Additionally we determined that rather than review 20% of files as monitoring guidance and HUD Training instructs, we did a 100% file review of all HOME assisted units. This ensured tenants were correctly screened, income qualified and all relevant documentation was in order including tenant selection plans, the lease, rent schedules, and utility allowances for Section 8 clients. On the financial end project budgets and cash flow statements were also collected and reviewed showing these properties to have healthy operations and organized asset management. These properties are funded through Low Income Housing Tax Credits (LIHTC) and receive annual monitoring by the State for both LIHTC and HOME as well as investor monitoring for LIHTC. All projects were in compliance with HOME regulations.

In FY19 (HUD Program Year 2018) we completed a risk assessment to determine if any HOME rental properties or active HOME projects warranted on-site monitoring. Based on the results of the risk analysis and the comprehensive nature of our PY17 monitoring activities, we determined that projects in the monitoring period presented low risk and warrant only desk audits.

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

The City of Missoula provides information and otherwise works to attract persons from all racial, ethnic and gender groups in the housing market to housing that is assisted with HOME program funding. The City places public notices in the local newspaper, has an email tree and mails to interested parties, advising of the availability of various programs to be undertaken. All written notices to owners and tenants contain either the Equal Housing Opportunity logo, statement or slogan:

- Equal Housing Opportunity Statement: We are pledged to the letter and spirit of U.S. policy for the achievement of equal housing opportunity throughout the Nation. We encourage and support an affirmative advertising and marketing program in which there are no barriers to

obtaining housing because of race, color, religion, sex, handicap, familial status, or national origin.

- Equal Housing Opportunity Slogan: Equal Housing Opportunity.

Participants in the HOME (and CDBG) programs are required to use affirmative fair marketing practices to inform potential owners and tenants, as well as the public, about federal fair housing laws. All HOME or CDBG-assisted housing providers must include the Equal Housing Opportunity logo, statement, or slogan in its written materials; solicit participants from various racial, ethnic or gender groups; maintain records of their affirmative marketing efforts; and maintain records of all tenants that must be provided for program monitoring.

Missoula uses the media, direct mailings, and email to contact the widest range possible of firms that will do business with the City, and makes a special point to seek proposals from minority and women's business enterprises. City contracts include provisions requiring contractors to seek subcontractors from minority and women's businesses and setting goals for the percentage of MBE/WBE contractors involved with a project funded by CDBG or HOME.

In PY2018, the Lee Gordon project, operated by the North Missoula Community Development Corporation (NMCDC) and funded with PY2016 HOME funds, developed an Affirmative Fair Marketing Plan for the sale of its units. NMCDC identified four groups in the housing market area that were least likely to apply for the units: American Indian or Alaska Native, Asian, Black or African American, and Hispanic or Latino. Their marketing program included commercial media (newspapers/publications and radio), outreach through housing services targeted to low-income Missoulians (homeownership education classes), and outreach to targeted community contacts (Missoula Urban Indian Health Center, American Indian Student Development Council, Summit Independent Living Center, and Missoula Aging Services).

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

The City of Missoula began PY2018 with a HOME program income balance of \$600 and added \$666.70 over the course of the program year. Of the total PI, \$799.95 was expended in PY2018 Homeward's Small Homes project. Homeward's Small Homes project aims to place and sell affordable manufactured housing units on infill sites within the City of Missoula. The HOME specific units (five total), once placed, will be sold to individuals or families earning 80% of the Area Median Income or less. The overall project increases homeownership stock and provides additional affordable housing units within the City of Missoula, both of which are stated objectives of the City of Missoula Consolidated Plan. As of the close of PY2018, Homeward had completed construction of the homes and was working towards selling all of the small homes.

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

91.320(j)

On June 24, 2019 the City of Missoula passed a comprehensive housing policy that outlined specific strategies aimed at creating and preserving affordable housing. These strategies included creating a LIHTC support program, preserving expiring use projects, support the conversion of mobile home parks into resident owned communities, creating homeowner rehabilitation loan programs, and expanding our current homeowner assistance programs. They also included a recommendation for increase support to partner organizations engaging in rental and homeowner education, eviction prevention work, and supportive services that help stabilize at risk populations in their housing.

Attachments

Attachment A: PR-26 CDBG Report_Corrected



PART I: SUMMARY OF CDBG RESOURCES		
01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR		0.00
02 ENTITLEMENT GRANT		545,906.00
03 SURPLUS URBAN RENEWAL		0.00
04 SECTION 308 GUARANTEED LOW FUNDS		0.00
05 CURRENT YEAR PROGRAM INCOME		29,370.05
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)		0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT		48,000.76
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)		623,306.81
PART II: SUMMARY OF CDBG EXPENDITURES		
09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION		525,351.29
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOWMOOD BENEFIT		0.00
11 AMOUNT SUBJECT TO LOWMOOD BENEFIT (LINE 09 + LINE 10)		525,351.29
12 DISBURSED BY IDIS FOR PLANNING/ADMINISTRATION		29,443.63
13 DISBURSED BY IDIS FOR SECTION 108 REPAYMENTS		0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES		0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)		554,794.92
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)		68,511.89
PART III: LOWMOOD BENEFIT THIS REPORTING PERIOD		
17 EXPENDED FOR LOWMOOD HOUSING IN SPECIAL AREAS		0.00
18 EXPENDED FOR LOWMOOD MULTI-UNIT HOUSING		0.00
19 DISBURSED FOR OTHER LOWMOOD ACTIVITIES		305,368.29
20 ADJUSTMENT TO COMPUTE TOTAL LOWMOOD CREDIT		0.00
21 TOTAL LOWMOOD CREDIT (SUM, LINES 17-20)		305,368.29
22 PERCENT LOWMOOD CREDIT (LINE 21/LINE 11)		75.25%
LOWMOOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS		
23 PROGRAM YEAR(S) COVERED IN CERTIFICATION	PR: PY: PY:	
24 CUMULATIVE MET EXPENDITURES SUBJECT TO LOWMOOD BENEFIT CALCULATION		0.00
25 CUMULATIVE EXPENDITURES BENEFITTING LOWMOOD PERSONS		0.00
26 PERCENT BENEFIT TO LOWMOOD PERSONS (LINE 25/LINE 24)		0.00%
PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS		
27 DISBURSED BY IDIS FOR PUBLIC SERVICES		105,060.00
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		125,062.90
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)		80,064.94
32 ENTITLEMENT GRANT		545,906.00
33 PRIOR YEAR PROGRAM INCOME		29,370.11
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP		0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)		575,276.11
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)		13.92%
PART V: PLANNING AND ADMINISTRATION (PA) CAP		
37 DISBURSED BY IDIS FOR PLANNING/ADMINISTRATION		29,443.63
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	18,828.90	unliquidated obligations as of end of PY18 minus unliquidated obligations as of end of PY17
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 + LINE 40)	48,270.23	corrected based on line 40
42 ENTITLEMENT GRANT	545,906.00	
43 CURRENT YEAR PROGRAM INCOME	28,370.05	
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00	
45 TOTAL SUBJECT TO PA CAP (SUM LINES 42-44)	575,276.05	
46 PERCENT FUNDS DELICATED FOR PA ACTIVITIES (LINE 45/LINE 40)	1.19%	corrected based on line 40

LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17
 Report required on GEM.

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

Plan Year	IDHS Project	FUND	Activity Name	MATRIX Code	NATIONAL Classification	Drawn Amount
2017	1	436	Mankara Mobility Impaired Housing, Inc. - Eagle Watch Estates	14B	LWH	\$59,318.00
				14B	Matrix Code	\$59,318.00
Total						\$59,318.00

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

Plan Year	IDHS Project	IDHS Activity	MATRIX Code	Activity Name	MATRIX Code	NATIONAL Classification	Drawn Amount
2017	2	436	6189411	City of Missoula - Invest Health Sakevaka	03L	LWA	\$24,000.00
2017	2	436	6285151	City of Missoula - Invest Health Sakevaka	03L	LWA	\$26,000.00
						Matrix Code	\$261,000.00
2017	6	440	6176676	Powerello Center - Coordinated Entry Housing Navigator	03T	LMC	\$2,750.00
2017	6	440	6180445	Powerello Center - Coordinated Entry Housing Navigator	03T	LMC	\$2,750.00
2017	7	441	6176283	Powerello Center - Rapid Intake and Assessment	03T	LMC	\$3,750.00
2017	7	441	6180445	Powerello Center - Rapid Intake and Assessment	03T	LMC	\$4,125.00
						Matrix Code	\$13,375.00
2017	5	439	6176283	Opportunity Resources, Inc. - Benton Ave. Housing	03C	LMC	\$29,116.20
2017	5	439	6176746	Opportunity Resources, Inc. - Benton Ave. Housing	03C	LMC	\$35,896.20
						Matrix Code	\$65,072.40
2017	4	438	6176283	Missoula Aging Services - Meals on Wheels	05A	LMC	\$5,700.00
2017	4	438	6176322	Missoula Aging Services - Meals on Wheels	05A	LMC	\$2,899.00
						Matrix Code	\$8,549.00
2017	3	437	6176283	Homewood - Financial and Rental Education/Counseling	09J	LWH	\$4,796.25
2017	3	437	6176617	Homewood - Financial and Rental Education/Counseling	09J	LWH	\$5,213.75
						Matrix Code	\$10,000.00
2017	8	442	6175969	YWCA - Adair Place Emergency Housing	05L	LMC	\$2,500.00
						Matrix Code	\$2,500.00
2018	2	424	6176716	NRADC - Lee Gordon Place (2018)	12	LWH	\$1,798.89
2018	2	424	6177077	NRADC - Lee Gordon Place (2018)	12	LWH	\$1,320.00
2018	2	424	6180664	NRADC - Lee Gordon Place (2018)	12	LWH	\$763.00
						Matrix Code	\$34,671.99
Total							\$395,368.29

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

Plan Year	IDHS Project	IDHS Activity	MATRIX Code	Activity Name	MATRIX Code	NATIONAL Classification	Drawn Amount
2017	6	440	6176676	Powerello Center - Coordinated Entry Housing Navigator	03T	LMC	\$2,750.00
2017	6	440	6180445	Powerello Center - Coordinated Entry Housing Navigator	03T	LMC	\$2,750.00
2017	7	441	6176283	Powerello Center - Rapid Intake and Assessment	03T	LMC	\$3,750.00
2017	7	441	6180445	Powerello Center - Rapid Intake and Assessment	03T	LMC	\$4,125.00
2018	3	449	6215178	Powerello Center - Rapid Intake and Housing Retention	03T	LMC	\$6,800.00
2018	3	449	6227051	Powerello Center - Rapid Intake and Housing Retention	03T	LMC	\$6,200.00

2018	3	449	6257922	Powerello Center - Rapid Intake and Housing Retention	03T	LMC	\$7,500.00
					03T	Matrix Code	\$35,075.00
2017	4	438	6176263	Missoula Aging Services - Meals on Wheels	05A	LMC	\$5,700.00
2017	4	438	6176262	Missoula Aging Services - Meals on Wheels	05A	LMC	\$2,849.00
2018	7	452	6257399	Missoula Aging Services - Care Transitions (2018)	05A	LMC	\$3,125.00
					05A	Matrix Code	\$1,714.00
2017	3	457	6176293	HomeWord - Financial and Rental Education/Counseling	05J	LHM	\$4,796.25
2017	3	457	6176617	HomeWord - Financial and Rental Education/Counseling	05J	LHM	\$5,213.75
2018	6	453	6211205	HomeWord - HomeOwnership Center Programs (2018)	05J	LMC	\$6,250.00
2018	6	453	6227030	HomeWord - HomeOwnership Center Programs (2018)	05J	LMC	\$16,250.00
					05J	Matrix Code	\$32,500.00
2017	8	442	6176969	YWCA - Adair Place Emergency Housing	05Z	LMC	\$2,500.00
2018	4	451	6211203	YWCA Adair Place Emergency Housing	05Z	LMC	\$5,700.00
2018	4	451	6226125	YWCA Adair Place Emergency Housing	05Z	LMC	\$11,400.00
2018	4	451	6253439	YWCA Adair Place Emergency Housing	05Z	LMC	\$5,400.00
					05Z	Matrix Code	\$25,000.00
Total							\$305,069.00

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

Plan Year	IDHS Project	IDHS Activity	Activity Name	Matrix Code	Federal Allocation	Drawn Amount	
2018	9	450	6166008	HCD CD8G Admin FY18	20	\$14,826.47	
2018	9	450	6166014	HCD CD8G Admin FY18	20	\$483.61	
2018	9	450	6218663	HCD CD8G Admin FY18	20	\$1,100.00	
2018	9	450	6226322	HCD CD8G Admin FY18	20	\$69.18	
2018	9	450	6226326	HCD CD8G Admin FY18	20	\$4,500.00	
2018	9	450	6226396	HCD CD8G Admin FY18	20	\$652.47	
2018	9	450	6226562	HCD CD8G Admin FY18	20	\$18,753.70	
2018	9	450	6226207	HCD CD8G Admin FY18	20	\$5,000.00	
2018	9	450	6247771	HCD CD8G Admin FY18	20	\$5,500.00	
2018	9	450	6261414	HCD CD8G Admin FY18	20	\$25.00	
2018	9	450	6261417	HCD CD8G Admin FY18	20	\$424.88	
2018	9	450	6263111	HCD CD8G Admin FY18	20	\$14,345.24	
					20	Matrix Code	\$64,009.35
2016	11	421	6202604	CD8G GDP Admin	21A	(\$49,000.76)	
2017	13	443	6166028	HCD - CD8G Admin	21A	\$12,566.54	
					21A	Matrix Code	(\$36,465.72)
Total						\$29,443.63	

PR-24
 CDBG Financial Summary Report: Report states Planning and Administration Cap -- 5.1 percent. Calculated Planning and Administration Cap -- 8.4 percent. Discrepancy. Reconcile.

PR-24 was manually adjusted on Line 40 to reflect final draws not complete by the end of FY2018. Those include the following projects. Per instructions for the PR-24, adjustment included unliquidated obligations for prior program year as well.

Program Year	Activity ID	Amount
2018	PR-03	
03 Activity ID 445		
Quarter 4 Administrative Draw Processed on 8/21/18		\$ 31,393.64
Program Year 2017 PR-03		
03 Activity ID 445		
Quarter 4 Administrative Draw Processed on 8/10/18		\$ 12,595.04
Adjustment to compute total PA obligations		\$ 18,826.68

PR03 - BOSMAAC (right)

Page by:
 Quarter: MISSOULA
 FY: Program Year: 2018

Year	PO	Project Name	Activity Name	Address	City	State	MTX	Status	Objective	Outcome	Fund	Ch	Funded	Drawn	Drawn	Drawn	Balance	Account	Report
														Amount	Amount	Amount			Year
2016	0611	CDBG 2016 ADMINISTRATION	421 CDBG GCP Adm		0	0	0	23A	C	0	0	0	20262506	66,611.44	66,611.44	(48,000.70)	0.00	0	0
2016	0602	HOME-16-02CDBG-16-01 North Missoula Community Development Corp. Leo Gordon Plaza	424 NMCDC - Leo G 903 E Pkwy NMCDC H LHMH					12	C	2	2	2	9180506	304,999.00	273,179.00	36,871.99	31,820.00	10	2018
2017	0001	Arcadia Spoke, Inc. - Eagle Wash Estates	425 Montana Meeting 305 Sunset Dr					14B	C	2	1	1	1890517	58,338.00	58,338.00	0.00	0.00	10	2018
2017	0002	City of Missoula - West Health Services	436 City of Missoula 436 Hwy. This page LMA					01F	C	1	1	1	3650518	261,000.00	261,000.00	261,000.00	0.00	01	2017
2017	0003	Homecare, Inc. - Financial and Rental Evaluation/Consulting	437 Homecare - Fin 1535 Lake Homecare LHMH					05U	C	2	2	2	1890517	20,000.00	20,000.00	10,000.00	0.00	04	2017
2017	0004	Missoula Aging Services - Meals on Wheels	438 Missoula Aging 1 327 Steg Missoula LMC					05A	C	1	1	1	1890517	11,289.00	11,289.00	0.00	0.00	01	2017
2017	0005	Opportunity Resources, Inc. - Seniors Adv. Housing Improvement Project	439 Opportunity Res 1327 Steg Opportunity LMC					03E	C	2	2	2	1890517	68,433.00	68,433.00	65,072.40	3,207.60	01	2017
2017	0006	Powerful Center - Coordinated Entry Housing Navigator	440 Powerful Center 1110 W Br In Accord LMC					03F	C	2	2	2	1890517	11,000.00	11,000.00	5,500.00	0.00	01	2017
2017	0007	Powerful Center - Rapid Reentry and Assessment	441 Powerful Center 1110 W Br In Accord LMC					03F	C	2	2	2	1890517	15,000.00	15,000.00	7,875.00	0.00	01	2017
2017	0008	YWCA of Missoula - Adams Place Emergency Housing	442 YWCA - Adams Pl 1130 W Br The YWCA LMC					06Z	C	2	2	2	1890517	25,000.00	25,000.00	0.00	0.00	01	2017
2017	0013	Office of Housing and Community Development - 2017 Administration and Planning	443 HCD - CDBG Adm - Office of H O					23A	C	0	0	0	1890517	42,217.96	38,424.90	12,566.04	6,793.06	0	0
2018	0003	Powerful Center - Rapid Reentry and Housing Retention	444 Powerful Center 1110 W Br In keeping LMC					03F	O	2	1	1	1270508	30,000.00	29,293.00	22,500.00	7,000.00	01	2018
2018	0004	YWCA Missoula - Adams Place Emergency Housing	446 YWCA Adams Pl 1130 W Br The YWCA LMC					06Z	O	2	2	2	16560508	25,000.00	22,500.00	22,500.00	2,500.00	01	2018
2018	0005	YWCA Missoula - YWCA Family Evaluation	454 YWCA Family E 3900 S Br YWCA Mt LMC					03C	O	1	1	1	125110508	390,000.00	0.00	0.00	390,000.00	11	2018
2018	0006	Homecare - Homeownership Center Programs	453 Homecare - Hm 1535 Lake Homecare LMC					05U	O	2	2	2	10500208	25,000.00	22,500.00	22,500.00	2,500.00	01	2018
2018	0007	Missoula Aging Services - Care Transitions	452 Missoula Aging 1 327 Steg To address LMC					05A	C	1	1	1	126110508	8,000.00	3,165.00	2,166.00	2,666.00	01	2018
2018	0008	Neighbourhoods MT - River Access Water Connection	457 Neighbourhoods MT 1300 River River Area LHMH					03J	O	2	2	2	30120509	65,000.00	0.00	0.00	65,000.00	10	0
2018	0009	Office of Housing & Community Development - 2018 Administration and Planning	450 HCD CDBG Adm - HCD Mt & O					23C	C	0	0	0	105110509	66,300.00	64,309.25	64,309.25	31,393.64	0	0

Administrative and Public Service Caps Worksheet

Admin & Planning Cap (20%)
 Determine the total amount of CDBG funds expended during the program year for activities that are classified as eligible under 24 CFR 970.225

\$29,463.02

Add to the above amount the total amount of unliquidated obligations for activities under these same two categories, as of the end of the pp.

\$31,393.64

Subtract from the balance the total amount of unliquidated obligations from these two subcategories, as of the end of the preceding year.

\$12,595.04

Enter the result of the above calculations. This is the amount of net obligations for PSA during the program year.

\$40,272.25 8.39%

PR-26 CDSS Financial Summary Report: Report states Public Service Cap - 18.3 percent. Calculated Public Service Cap - 35.1 percent. Clear the maximum cap of 15 percent and discrepancy between reported and calculated. Correct and re-submit.

PR-26 was manually adjusted on line 30 to reflect final draws not complete by the end of FY2018. These include the following projects. Per instructions for the PR-26, adjustment included unliquidated obligations for prior program year as well.

Program Year 2018 PR-43	
TOTAL P118 Unliquidated Obligations	\$ 3,393.94
EDS Activity ID	
449 - Poverello Center - Rapid Intake and Housing Retention Q4 Draw	\$ 708.84
451 - YWCA Adm's Place Emergency Housing Q4 Draw	\$ 2,500.00
452 - Missouri Aging Services - Care Transitions Q4 Draw	\$ 3,393.90
453 - HomeShare - HomeOwnership Center Programs Q4 Draw	\$ 2,500.00

Program Year 2017 PR-43	
TOTAL P117 Unliquidated Obligations	\$ 34,424.00
EDS Activity ID	
437 - HomeShare - Financial and Rental Education/Counseling	\$ 13,000.00
438 - Missouri Aging Services - Meals on Wheels	\$ 4,548.00
440 - Poverello Center - Coordinated Entry Housing Navigator	\$ 4,500.00
441 - Poverello Center - Rapid Intake and Assessment	\$ 7,476.00
442 - YWCA - Adm's Place Emergency Housing	\$ 3,500.00

Adjustment to compare total P5 obligations **\$(25,032.06)**

PR20 - DCSHMIC (original)

Page 10:

Grant: MISSOURIA

FY Program Year: 2018

Year	PID	Project Name	EDS Activity	Activity Name	Address	Description	NORSE	PULM	MTX	SOSW	S	Objective		Outcome		Draw Thru	Draw In	Account	Report
												Start	End	Start	End				
2018	0013	CDSS 2018 ADMINISTRATION	A	421 CDSS CDF Admin	D	D	0 22A	C	0	0	0	20250216	56,811.44	56,811.44	48,008.70	0.00	0	0	0
2016	0002	HOMES-16-05/CDSS-16-01 North Missouri Community Development Corp. Lee Gordon Place		424 NMCCDC - Lee Gordon P 563 E Front S NMCCDC Inc I LMH			0 12	C	2	2	9/15/2016	304,899.00	273,175.00	34,871.08	31,820.00	30	2016		
2017	0003	Accomable Spca, Inc - Eagle Wash Children		426 Montana Mobility Income 563 Benton St D LMH			0 14B	C	2	1	11/9/2017	28,310.00	28,310.00	29,320.00	0.00	30	2016		
2017	0002	City of Missouri - Inmate Health Services		428 City of Missouri - Inmate I 429 Benton St The content is LMA			02 01 02L	C	1	1	3/6/2018	201,200.00	201,200.00	201,200.00	0.00	0L	2017		
2017	0003	HomeShare - Financial and Rental Education/Counseling		437 HomeShare - Financial at 1835 Liberty HomeShare at LMH			0 05U	C	2	2	11/9/2017	20,000.00	20,000.00	10,000.00	0.00	04	2017		
2017	0004	Missouri Aging Services - Meals on Wheels		438 Missouri Aging Services 397 Southeast Missouri Ave LMC			0 06A	C	1	1	11/9/2017	11,399.00	11,399.00	8,549.00	0.00	0L	2017		
2017	0005	Opportunity Resources, Inc - Rental Ass. Housing Improvement Project		439 Opportunity Resources, 12827 Benton, Opportunity R LMC			0 03C	C	2	2	11/9/2017	68,400.00	68,400.00	69,372.40	3,827.60	0L	2017		
2017	0006	Poverello Center - Coordinated Entry Housing Navigator		440 Poverello Center - Covid 1110 W Blue In accordance LMC			0 08T	C	2	2	11/9/2017	11,000.00	11,000.00	8,500.00	0.00	0L	2017		
2017	0007	Poverello Center - Rapid Intake and Assessment		441 Poverello Center - Rapid 1110 W Blue In accordance LMC			0 08T	C	2	2	11/9/2017	18,000.00	18,000.00	7,875.00	0.00	0L	2017		
2017	0008	YWCA of Missouri - Adm's Place Emergency Housing		442 YWCA - Adm's Place 1100 W Blue The YWCA is LMC			0 06C	C	2	2	11/9/2017	26,000.00	26,000.00	23,800.00	0.00	0L	2017		
2017	0013	Office of Housing and Community Development - EET Administration and Planning		443 HCD - CDSS Admin Office of Hse D			0 22A	O	0	0	11/9/2017	42,217.06	46,424.00	12,589.04	6,793.88	0	0		
2018	0003	Poverello Center - Rapid Intake and Housing Retention		449 Poverello Center - Rapid 1110 W Blue In keeping with LMC			0 08T	O	2	1	12/15/2018	96,000.00	28,265.00	22,800.00	336.04	0L	2018		
2018	0004	YWCA Missouri - Adm's Place Emergency Housing		454 YWCA Adm's Place 1100 W Blue The YWCA is LMC			0 06C	O	2	2	12/15/2018	26,000.00	22,600.00	22,600.00	3,400.00	0L	2018		
2018	0005	YWCA Missouri - YWCA Facility Expansion		454 YWCA Facility Expansion 1835 S Blue YWCA Miss LMC			0 09C	O	1	1	12/15/2018	96,000.00	0.00	0.00	96,000.00	0L	2018		
2018	0006	HomeShare - HomeOwnership Center Programs		459 HomeShare - HomeShare 1835 Liberty HomeShare at LMC			0 05U	O	2	2	12/15/2018	28,000.00	22,800.00	22,800.00	2,800.00	0L	2018		
2018	0007	Missouri Aging Services - Care Transitions		462 Missouri Aging Services 207 Southwest St actonville Mo LMC			0 06A	C	1	1	12/15/2018	6,800.00	3,246.00	3,146.00	3,654.00	0L	2018		
2018	0008	NeighborWorks/MF Home Access/Veteran Connection		463 NeighborWorks/MF Home Access River St River Access at LMH			0 02J	O	2	2	12/15/2018	62,000.00	0.00	0.00	62,000.00	0L	0		
2018	0009	Office of Housing and Community Development - 2018 Administration and Planning		460 HCD CDSS Admin PVI1 HCD will adm D			0 2D	C	0	0	12/15/2018	96,300.00	64,800.36	64,800.36	31,491.64	0	0		

Administrative and Public Service Caps Worksheet

Public Service Cap (PSC)

Enter into the total amount of CDSS funds expended during the program year for activities that are classified as eligible under 24 CFR 201.211(b) and any public services covered out by a CACID under 24 CFR 201.204 that are not exempt from the cap as provided under 24 CFR 201.204(b)(2)(B) or (C) (matrix codes 05 and 07) and enter the total here.

\$164,398.00

Add to the above amount the total amount of unliquidated obligations for activities under these caps into categories, as of the end of the FY.

\$ 3,393.94

Subtract from the balance the total amount of unfilled obligations from these two categories, as of the end of the preceding year: \$ 34,424,891

This is the amount of net obligations for public services that were incurred during the program year and are subject to the cap. \$ 60,926,944

33.90%

Attachment B: HUD Form 40107 and 40107A

Annual Performance Report HOME Program

U.S. Department of Housing
and Urban Development
Office of Community Planning
and Development

OMB Approval No. 2506-0171
(exp. 8/31/2009)

Public reporting burden for this collection of information is estimated to average 2.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

The HOME statute imposes a significant number of data collection and reporting requirements. This includes information on assisted properties, on the owners or tenants of the properties, and on other programmatic areas. The information will be used: 1) to assist HOME participants in managing their programs; 2) to track performance of participants in meeting fund commitment and expenditure deadlines; 3) to permit HUD to determine whether each participant meets the HOME statutory income targeting and affordability requirements; and 4) to permit HUD to determine compliance with other statutory and regulatory program requirements. This data collection is authorized under Title II of the Cranston-Gonzalez National Affordable Housing Act or related authorities. Access to Federal grant funds is contingent on the reporting of certain project-specific data elements. Records of information collected will be maintained by the recipients of the assistance. Information on activities and expenditures of grant funds is public information and is generally available for disclosure. Recipients are responsible for ensuring confidentiality when public disclosure is not required.

This form is intended to collect numeric data to be aggregated nationally as a complement to data collected through the Cash and Management Information (CMI) System. Participants should enter the reporting period in the first block. The reporting period is October 1 to September 30. Instructions are included for each section if further explanation is needed.

Submit this form on or before December 31. Send one copy to the appropriate HUD Field Office and one copy to: HOME Program, Rm 7176, 451 7th Street, S.W., Washington D.C. 20410	This report is for period (mm/dd/yyyy) Starting: 07/01/2016 Ending: 06/30/2019	Date Submitted (mm/dd/yyyy) 09/30/2019
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Part I Participant Identification

1. Participant Number M-16-MC-30-0219	2. Participant Name City of Missoula	4. Phone Number (Include Area Code) 406-552-6396
3. Name of Person completing this report Munlana James	5. Address 435 Ryman St.	6. City Missoula
	7. State MT	8. Zip Code 59802

Part II Program Income

Enter the following program income amounts for the reporting period: in block 1, enter the balance on hand at the beginning; in block 2, enter the amount generated; in block 3, enter the amount expended; and in block 4, enter the amount for Tenant-Based Rental Assistance.

1. Balance on hand at Beginning of Reporting Period 600.00	2. Amount received during Reporting Period 666.00	3. Total amount expended during Reporting Period 800.00	4. Amount expended for Tenant-Based Rental Assistance 0.00	5. Balance on hand at end of Reporting Period (1 + 2 - 3) = 5 466.00
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Part III Minority Business Enterprises (MBE) and Women Business Enterprises (WBE)

In the table below, indicate the number and dollar value of contracts for HOME projects completed during the reporting period.

	a. Total	Minority Business Enterprises (MBE)			f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	
A. Contracts					
1. Number	13	0	0	0	13
2. Dollar Amount	\$2,121,852.00	\$0.00	\$0.00	\$0.00	\$2,121,852.00
B. Sub-Contracts					
1. Number	0	0	0	0	0
2. Dollar Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	a. Total	b. Women Business Enterprises (WBE)	c. Male		
C. Contracts					
1. Number	13	2	11		
2. Dollar Amount	\$2,121,852.00	\$294.00	\$2,121,568.00		
D. Sub-Contracts					
1. Number	0	0	0		
2. Dollar Amount	\$0.00	\$0.00	\$0.00		

Part IV Minority Owners of Rental Property

In the table below, indicate the number of HOME assisted rental property owners and the total dollar amount of HOME funds in those rental properties assisted during the reporting period.

	a. Total	Minority Property Owners			f. White Non-Hispanic
		b. Alaskan Native or American Indian	e. Asian or Pacific Islander	d. Black Non-Hispanic	
1. Number					
2. Dollar Amount					

Part V Relocation and Real Property Acquisition

Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition. The data provided should reflect only displacements and acquisitions occurring during the reporting period.

	a. Number	b. Cost
1. Parcels Acquired		
2. Businesses Displaced		
3. Nonprofit Organizations Displaced		
4. Households Temporarily Relocated, not Displaced		

Households Displaced	a. Total	Minority Business Enterprises (MBE)			f. White Non-Hispanic
		b. Alaskan Native or American Indian	e. Asian or Pacific Islander	d. Black Non-Hispanic	
5. Households Displaced - Number					
6. Households Displaced - Cost					

Public reporting burden for this collection of information is estimated to average 45 minutes per response, including the time for reviewing existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

The HOME statute imposes a significant number of data collection and reporting requirements. This includes information on assisted properties, on the owners or tenants of the properties, and on other programmatic areas. The information will be used: 1) to assist HOME participants in managing their programs; 2) to track performance of participants in meeting fund commitment and expenditure ceilings; 3) to permit HUD to determine whether each participant meets the HOME statutory income targeting and affordability requirements; and 4) to permit HUD to determine compliance with other statutory and regulatory program requirements. This data collection is authorized under Title II of the President-Gonzalez-Kabral Affordable Housing Act or related authorities. Access to Federal grant funds is contingent on the reporting of certain project-specific data elements. Records of information collected will be made available to the recipients of the assistance. Information on activities and expenditures of grant funds is public information and is generally available for disclosure. Recipients are responsible for ensuring confidentiality when public disclosure is not required.

Instructions for the HOME Match Report

Applicability:

The HOME Match Report is part of the HOME APR and must be filled out by every participating jurisdiction that incurred a match liability. Match liability occurs when FY 1993 funds (or subsequent year funds) are drawn down from the U.S. Treasury for HOME projects. A Participating Jurisdiction (PJ) may start accruing match contributions as of the beginning of Federal Fiscal Year 1993 (October 1, 1992). A jurisdiction not required to submit this report, either because it did not incur any match or because it had a full match reduction, may submit a HOME Match Report if it wishes. The match would count as excess match that is carried over to subsequent years. The match reported on this form must have been contributed during the reporting period (between October 1 and September 30).

Timing:

This form is to be submitted as part of the HOME APR on or before December 31. The original is sent to the HUD Field Office. One copy is sent to the

Office of Affordable Housing Programs, CGHF
Room 7176, HUD, 451 7th Street, S.W.
Washington, D.C. 20410.

The participating jurisdiction also keeps a copy.

Instructions for Part II:

1. **Excess match from prior Federal fiscal year:** Excess match carried over from prior Federal fiscal year.
2. **Match contributed during current Federal fiscal year:** The total amount of match contributions for all projects listed under Part III in column 9 for the Federal fiscal year.

3. **Total match available for current Federal fiscal year:** The sum of excess match carried over from the prior Federal fiscal year (Part II, line 1) and the total match contribution for the current Federal fiscal year (Part II, line 2). This sum is the total match available for the Federal fiscal year.

4. **Match liability for current Federal fiscal year:** The amount of match liability is available from HUD and is provided periodically to PJs. The match must be provided in the current year. The amount of match that must be provided is based on the amount of HOME funds drawn from the U.S. Treasury for HOME projects. The amount of match required equals 25% of the amount drawn down for HOME projects during the Federal fiscal year. Excess match may be carried over and used to meet match liability for subsequent years (see Part II line 5). Funds drawn down for administrative costs, CHDO operating expenses, and CHDO capacity building do not have to be matched. Funds drawn down for CHDO seed money and/or technical assistance loans do not have to be matched if the project does not go forward. A jurisdiction is allowed to get a partial reduction (50%) of match if it meets one of two statutory distress criteria, indicating "fiscal distress," or else a full reduction (100%) of match if it meets both criteria, indicating "severe fiscal distress." The two criteria are poverty rate (must be equal to or greater than 125% of the average national family poverty rate to qualify for a reduction) and per capita income (must be less than 75% of the national average per capita income to qualify for a reduction). In addition, a jurisdiction can get a full reduction if it is declared a disaster area under the Robert T. Stafford Disaster Relief and Emergency Act.

5. **Excess match carried over to next Federal fiscal year:** The total match available for the current Federal fiscal year (Part II, line 3) minus the match liability for the current Federal fiscal year (Part II, line 4). Excess match may be carried over and applied to future HOME project match liability.

Instructions for Part III:

1. **Project No. or Other ID:** "Project number" is assigned by the CMI System when the PJ makes a project setup call. These projects involve at least some Treasury funds. If the HOME project does not involve Treasury funds, it must be identified with "other ID" as follows: the fiscal year (last two digits only), followed by a number (starting from "01" for the first non-Treasury-funded project of the fiscal year), and then at least one of the following abbreviations: "SF" for project using shortfall funds, "PI" for projects using program income, and "NON" for non-HOME-assisted affordable housing. Example: 93.01.SF, 93.02.PI, 93.03.NON, etc.

Shortfall funds are non-HOME funds used to make up the difference between the participation threshold and the amount of HOME funds allocated to the PJ; the participation threshold requirement applies only in the PJ's first year of eligibility. [§92.102]

Program income (also called "repayment income") is any return on the investment of HOME funds. This income must be deposited in the jurisdiction's HOME account to be used for HOME projects. [§92.503(b)]

Non-HOME-assisted affordable housing is investment in housing not assisted by HOME funds that would qualify as "affordable housing" under the HOME Program definitions. "NON" funds must be contributed to a specific project; it is not sufficient to make a contribution to an entity engaged in developing affordable housing. [§92.219(b)]

2. **Date of Contribution:** Enter the date of contribution. Multiple entries may be made on a single line as long as the contributions were made during the current fiscal year. In such cases, if the contributions were made at different dates during the year, enter the date of the last contribution.

3. **Cash:** Cash contributions from non-Federal resources. This means the funds are contributed permanently to the HOME Program regardless of the form of investment the jurisdiction provides to a project. Therefore all repayment, interest, or other return on investment of the contribution must be deposited in the PJ's HOME account to be used for HOME projects. The PJ, non-Federal public entities (State/local governments), private entities, and individuals can make contributions. The grant equivalent of a below-market interest rate loan to the project is eligible when the loan is not repayable to the PJ's HOME account. [§92.220(a)(1)] In addition, a cash contribution can count as match if it is used for eligible costs defined under §92.206 (except administrative costs and CHDO operating expenses) or under §92.209, or for the following non-eligible costs: the value of non-Federal funds used to remove and relocate ECHO units to accommodate eligible tenants, a project reserve account for relocations, a project reserve account for unanticipated increases in operating costs, operating subsidies, or costs relating to the portion of a mixed-income or mixed-use project not related to the affordable housing units. [§92.219(c)]

4. **Foregone Taxes, Fees, Charges:** Taxes, fees, and charges that are normally and customarily charged but have been waived, foregone, or deferred in a manner that achieves affordability of the HOME-assisted housing. This includes State tax credits for low-income housing development. The amount of real estate taxes may be based on the

post-improvement property value. For these taxes, fees, or charges given for future years, the value is the present discounted cash value. [§92.220(a)(2)]

5. **Appraised Land/Real Property:** The appraised value, before the HOME assistance is provided, and minus any debt/burden, lien, or other encumbrance, of land or other real property, not acquired with Federal resources. The appraisal must be made by an independent, certified appraiser. [§92.220(a)(3)]

6. **Required Infrastructure:** The cost of investment, not made with Federal resources, in on-site and off-site infrastructure directly required for HOME-assisted affordable housing. The infrastructure must have been completed no earlier than 12 months before HOME funds were committed. [§92.220(a)(4)]

7. **Site preparation, Construction materials, Donated labor:** The reasonable value of any site preparation and construction materials, not acquired with Federal resources, and any donated or voluntary labor (see §92.354(3)) in connection with the site-preparation (or, or construction or rehabilitation of, affordable housing. The value of site-preparation and construction materials is determined in accordance with the PJ's cost estimate procedures. The value of donated or voluntary labor is determined by a single rate ("labor rate") to be published annually in the Notice Of Funding Availability (NOFA) for the HOME Program. [§92.220(6)]

8. **Bond Financing:** Multifamily and single-family project bond financing must be validly issued by a State or local government (or an agency, instrumentality, or political subdivision thereof), 50% of a loan from bond proceeds made to a multifamily affordable housing project owner can count as match. 25% of a loan from bond proceeds made to a single-family affordable housing project owner can count as match. Loans from all bond proceeds, including excess bond match from prior years, may not exceed 25% of a PJ's total annual match contribution. [§92.220(a)(5)] The amount in excess of the 25% cap for bonds may carry over, and the excess will count as part of the statutory limit of up to 25% per year. Requirements regarding

bond financing as an eligible source of match will be available upon publication of the implementing regulation early in FY 1994.

9. **Total Match:** Total of items 3 through 8. This is the total match contribution for each project identified in item 1.

Ineligible forms of match include:

1. Contributions made with or derived from Federal resources e.g. CDBG funds [§92.220(b)(1)]
2. Interest rate subsidy attributable to the Federal tax-exemption on financing or the value attributable to Federal tax credits [§92.220(b)(2)]
3. Contributions from builders, contractors or investors, including owner equity, involved with HOME-assisted projects. [§92.220(b)(3)]
4. Sweat equity [§92.220(b)(4)]
5. Contributions from applicants/recipients of HOME assistance [§92.220(b)(5)]
6. Fees/charges that are associated with the HOME Program only, rather than normally and customarily charged on all transactions or projects [§92.220(a)(2)]
7. Administrative costs

Attachment C: Summary of Public Comment

Attachment C – Summary of Public Comment

The Draft PY2018 CAPER was made available for public comment between September 29, 2019 and October 14, 2019 and the City of Missoula received no public comments in response.

**AFFIDAVIT OF PUBLICATION
THE MISSOULIAN**

500 S. Higgins Ave.
Missoula, MT 59801
Phone: (406) 523-5236 Fax: (406) 523-5221

Ad Number: 20582210

Chris Arvish, being first duly sworn, deposes and says that he is a Classified Advertising Representative of The Missoulian, a newspaper of general circulation published daily in the City of Missoula, in the County of Missoula, State of Montana, and has charge of the Advertisements thereof.

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Public comment

a true copy of which is hereto annexed, was published in said newspaper on the following dates: via:

September 29 to October 6, 2019

Making all 2 publication(s)

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Chris Arvish

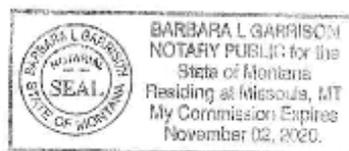
State of Montana
County of Missoula

Subscribed & sworn before me this 9th day of

October 2019 by Chris Arvish.



Notary Public for the State of Montana



Page	:	1 of 1	10/04/2019 13:26:07	Ad Number	:	11466443
Order Number	:	20582210		Ad Key	:	
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Notes	:					
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PUBLIC COMMENT SOLICITED
The City of Missoula's Program Year 2018 DRAFT Consolidated Annual Performance and Evaluation Report (CAPER) is now available for public review and comment. The City is required to prepare a CAPER each year which describes program accomplishments for the Community Development Block Grant (CDBG) and Home Investment Partnership Program (HOME) programs for the program year ending June 30, 2018. Public comments on the City's performance received by October 14, 2019, will be included in the final version of the CAPER to be submitted to the U.S. Department of Housing and Urban Development (HUD). Comments may be made in writing to the Missoula Office of Housing & Community Development, 435 Ryman, Missoula, MT, 59802 or via email to james@missoula.mt.us. The City of Missoula and the Office of Housing & Community Development welcome comments on its CDBG and HOME activities, Consolidated Plan, and annual Action Plan on a year-round basis.

Copies of the CAPER are available for review at Housing & Community Development's office at 400 Ryman (main entrance on Pine St.) or at <https://www.ci.missoula.mt.us/20887/Housing-Community-Development>. Persons wishing to receive a copy of the CAPER or to review it in an alternative format should contact Monica James at Housing & Community Development, 405-552-6396. Those who are deaf or hard of hearing may contact TTY 711. Those who need assistance to participate (non-English speaking, hearing impaired, etc.) should contact Housing & Community Development to request special arrangements.



**EQUAL HOUSING
OPPORTUNITY**

420c89210 September 28 & October 6, 2019

Attachment D: HUD Forms 60002



Section 3 Summary Report

Economic Opportunities for Low- and Very Low-Income Persons
 U.S. Department of Housing and Urban Development
 Office of Fair Housing and Equal Opportunity

OMB Approval No. 2529-0043
 (exp. 11/30/2018)

Disbursement Agency
CITY OF MISSOULA
435 RYMAN OFFICE OF PLANNING & GRANTS, MISSOULA, MT 59802
81-6001293

Reporting Entity
CITY OF MISSOULA
435 RYMAN OFFICE OF PLANNING & GRANTS, MISSOULA, MT 59802

Dollar Amount	\$554,001.92
Contact Person	Colin Woodrow
Date Report Submitted	09/25/2019

Reporting Period		Program Area Code	Program Area Name
From	To		
7/1/18	6/30/19	CDB1	Community Devel Block Grants

Part I: Employment and Training

Job Category	Number of New Hires	Number of New Hires that Are Sec. 3 Residents	Aggregate Number of Staff Hours Worked	Total Staff Hours for Section 3 Employees	Number of Section 3 Trainees
The expenditure of these funds did not result in any new hires.					

Total New Hires	0
Section 3 New Hires	0
Percent Section 3 New Hires	N/A
Total Section 3 Trainees	0
The minimum numerical goal for Section 3 new hires is 30%.	

Part II: Contracts Awarded

Construction Contracts	
Total dollar amount of construction contracts awarded	\$261,000.00
Total dollar amount of contracts awarded to Section 3 businesses	\$0.00
Percentage of the total dollar amount that was awarded to Section 3 businesses	0.0%
Total number of Section 3 businesses receiving construction contracts	0
The minimum numerical goal for Section 3 construction opportunities is 10%.	

Non-Construction Contracts	
Total dollar amount of all non-construction contracts awarded	\$0.00
Total dollar amount of non-construction contracts awarded to Section 3 businesses	\$0.00
Percentage of the total dollar amount that was awarded to Section 3 businesses	N/A
Total number of Section 3 businesses receiving non-construction contracts	0
The minimum numerical goal for Section 3 non-construction opportunities is 3%.	

Part III: Summary

Indicate the efforts made to direct the employment and other economic opportunities generated by HUD financial assistance for housing and community development programs, to the greatest extent feasible, toward low- and very low-income persons, particularly those who are recipients of government assistance for housing.	
Yes	Attempted to recruit low-income residents through: local advertising media, signs prominently displayed at the project site, contacts with community organizations and public or private agencies operating within the metropolitan area (or nonmetropolitan county) in which the Section 3 covered program or project is located, or similar methods.
No	Participated in a HUD program or other program which promotes the training or employment of Section 3 residents.
No	Participated in a HUD program or other program which promotes the award of contracts to business concerns which meet the definition of Section 3 business concerns.
No	Coordinated with Youthbuild Programs administered in the metropolitan area in which the Section 3 covered project is located.
No	Other; describe below.
<p>The only construction or construction-related CDBG funded project was a sidewalk installation project in two LMI neighborhoods. While there were efforts to recruit Section 3 residents through local advertisements, site signage, and direct encouragement with the subrecipient and the contractors on the project, no new hires were made. The subrecipient and contractors did make good faith efforts, but given the scale of this project and the timing of the work no subcontractor had a direct need to fill vacancies specifically for this project. It is our hope that with increased education and outreach regarding Section 3 our construction community will be more open and able to assist us in reaching Section 3 goals.</p>	



Section 3 Summary Report

Economic Opportunities for Low- and Very Low-Income Persons
 U.S. Department of Housing and Urban Development
 Office of Fair Housing and Equal Opportunity

OMB Approval No. 2529-0043
 (exp. 11/30/2018)

Disbursement Agency
CITY OF MISSOULA
435 RYMAN OFFICE OF PLANNING & GRANTS, MISSOULA, MT 59802
81-6001293

Reporting Entity
CITY OF MISSOULA
435 RYMAN OFFICE OF PLANNING & GRANTS, MISSOULA, MT 59802

Dollar Amount:	\$440,334.07
Contact Person:	Colin Woodrow
Date Report Submitted:	09/25/2019

Reporting Period		Program Area Code	Program Area Name
From	To		
7/1/18	6/30/19	HOME	HOME Program

The expenditure of these funds did not result in any covered contracts or new hires during the 12-month period selected.