

CONSOLIDATED ANNUAL PERFORMANCE AND  
EVALUATION REPORT (CAPER)  
FOR HOUSING & COMMUNITY DEVELOPMENT IN  
SUBURBAN MONROE COUNTY

2020-2021



Affordable Rental Housing Project



Home Improvement Program Project with solar - Before and After



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**October 28, 2021**

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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.

The 2020-21 program year is the first year of the five-year Strategic Plan for Monroe County. Monroe County's Consolidated Annual Performance and Evaluation Report (CAPER) administered by the Department of Planning and Development, Community Development division provides an assessment of expenditures and accomplishments achieved through federal grant funds provided by the U.S. Department of Housing and Urban Development (HUD). For the program year, Monroe County utilized CDBG and HOME funding for a number of activities targeted at providing more affordable housing options and infrastructure improvements in suburban towns and villages to benefit low to moderate-income families, seniors, and persons with special needs during the 2020-21 program year, which covers the period of August 1, 2020- July 31, 2021.

At the start of the program year, Monroe County, New York State, and the nation began to reopen after a multi-month shut down due to the impacts of the COVID-19 pandemic that hit the nation in the early part of 2020. While the shut down was lifted, the reopening has seen material delays and price swings, labor shortages, and an overall uncertainty in the future, which had a tremendous impact on housing and the economy in Monroe County resulting in the lower outcomes reflected in this report for CDBG and HOME funded programs than originally anticipated.

Monroe County received \$3,800,299 of Community Development Block Grant – COVID-19 (CDBG-CV) funds from the U.S. Department of Housing and Urban Development. These funds were used in a variety of ways to support the community effort to ***“Prepare, Prevent and Respond to”*** the coronavirus including a food and medicine delivery service for seniors, vaccine clinics, quarantine rooms in a congregate shelter, providing direct rental assistance to tenants in Suburban Monroe County, and an economic development loan/grant program for small businesses.

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

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee's program year goals.

| Goal   | Category           | Source / Amount | Indicator   | Unit of Measure        | Expected – Strategic Plan | Actual – Strategic Plan | Percent Complete | Expected – Program Year | Actual – Program Year | Percent Complete |
|--|--------------------|-----------------|---|------------------------|---------------------------|-------------------------|------------------|-------------------------|-----------------------|------------------|
| Develop Affordable Housing Opportunities           | Affordable Housing | HOME: \$        | Rental units constructed  | Household Housing Unit | 120                       | 6                       | 5.00%            | 19                      | 6                     | 31.58%           |
| Develop Affordable Housing Opportunities           | Affordable Housing | HOME: \$        | Homeowner Housing Added   | Household Housing Unit | 0                         | 2                       |                  | 3                       | 2                     | 66.67%           |
| Develop Affordable Housing Opportunities           | Affordable Housing | HOME: \$        | Direct Financial Assistance to Homebuyers   | Households Assisted    | 40                        | 8                       | 20.00%           | 25                      | 8                     | 32.00%           |
| Improve access to and quality of public facilities | Public Facilities  | CDBG: \$        | Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit | Persons Assisted       | 0                         |                         |                  | 0                       | 0                     |                  |
| Improve access to and quality of public facilities | Public Facilities  | CDBG: \$        | Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit        | Households Assisted    | 0                         | 12565                   |                  | 7310                    | 12565                 | 171.89%          |

|  |  |                    |  |                     |     |     |           |      |     |         |
|--|--|--------------------|--|---------------------|-----|-----|-----------|------|-----|---------|
| Improve access to and quality of public facilities | Public Facilities  | CDBG: \$           | Other  | Other               | 1   | 1   | 100.00%   | 1    | 0   | 0.00%   |
| Provide Economic Development and Job Training      | Non-Homeless Special Needs Non-Housing Community Development | CDBG: \$           | Jobs created/retained  | Jobs                | 40  | 8   | 20.00%    | 5    | 2   | 40.00%  |
| Provide Economic Development and Job Training      | Non-Homeless Special Needs Non-Housing Community Development | CDBG: \$           | Businesses assisted  | Businesses Assisted | 0   | 0   |           | 1    |     | %       |
| Provide essential public services                  | Homeless Non-Homeless Special Needs                          | CDBG: \$ / ESG: \$ | Public service activities other than Low/Moderate Income Housing Benefit | Persons Assisted    | 50  | 978 | 1,956.00% | 0    |     |         |
| Provide essential public services                  | Homeless Non-Homeless Special Needs                          | CDBG: \$ / ESG: \$ | Public service activities for Low/Moderate Income Housing Benefit        | Households Assisted | 50  | 196 | 392.00%   | 1559 | 978 | 62.73%  |
| Provide essential public services                  | Homeless Non-Homeless Special Needs                          | CDBG: \$ / ESG: \$ | Tenant-based rental assistance / Rapid Rehousing                         | Households Assisted | 150 | 308 | 205.33%   | 45   | 308 | 684.44% |
| Provide essential public services                  | Homeless Non-Homeless Special Needs                          | CDBG: \$ / ESG: \$ | Homeless Person Overnight Shelter  | Persons Assisted    | 0   | 90  |           | 200  | 63  | 31.50%  |

|  |   |                     |                                 |                        |     |     |         |    |     |         |
|--|---|---------------------|---------------------------------|------------------------|-----|-----|---------|----|-----|---------|
| Provide essential public services            | Homeless Non-Homeless Special Needs                         | CDBG: \$ / ESG: \$  | Homelessness Prevention         | Persons Assisted       | 150 | 219 | 146.00% | 70 | 219 | 312.86% |
| Provide essential public services            | Homeless Non-Homeless Special Needs                         | CDBG: \$ / ESG: \$  | Other                           | Other                  | 0   | 0   |         | 35 | 148 | 422.86% |
| Provide planning and administration services | Non-Housing Community Development Planning / Administration | CDBG: \$ / HOME: \$ | Homeowner Housing Rehabilitated | Household Housing Unit | 0   |     |         | 0  | 0   |         |
| Provide planning and administration services | Non-Housing Community Development Planning / Administration | CDBG: \$ / HOME: \$ | Other                           | Other                  | 1   | 1   | 100.00% | 1  | 1   | 100.00% |
| Repair and conserve existing housing stock   | Affordable Housing  | CDBG: \$ / HOME: \$ | Homeowner Housing Rehabilitated | Household Housing Unit | 200 | 54  | 27.00%  | 60 | 54  | 90.00%  |

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

**Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.**

Continuing in our efforts to preserve existing housing stock through the Home Improvement Program (HIP), CD staff completed projects that maintained property values and to stabilize housing in the community. A total of 54 projects (CDBG:33, HOME:21) were completed during the program year, totaling \$841,426 (CDBG: \$454,647, HOME: \$386,779), with an average project costs of \$15,581. Of the 54 total HIP projects, six

(6) included rooftop solar installation. Two (2) additional projects have been approved and are pending completion of the solar component before they will be completed in IDIS. HIP Projects were completed in the towns of Brighton, Chili, Churchville, Clarkson, Fairport, Gates, Hamlin, Henrietta, Honeoye Falls, Parma, Penfield, Riga, Wheatland, Webster, town/village of East Rochester, and Spencerport. HOME funded projects were also completed in the towns of Greece and Irondequoit.

Monroe County continued funding three (3) public service programs administered by the Housing Council at Pathstone, which provides comprehensive services to residents in suburban Monroe County. These programs are: 1- The Homeownership Assistance Program which provides education and assistance to prospective homeowners who wish to purchase their first home. As part of this program, the Housing Council also receives a set-aside of HOME funds to provide direct closing cost and/or down payment assistance to income eligible homebuyers who purchase their first home in suburban Monroe County. During the 2020-21 program year, the Housing Council interviewed and advised 179 potential First Time Homebuyers and assisted 55 homeowners with the purchase of their first home. Of those, eight (8) received direct subsidies for closing cost and/or down payment assistance totaling \$62,511 (average \$7,814 per homebuyer). The Housing Council also provided 12 pre-purchase workshops to 196 attendees to educate on the benefits and potential pit-falls of purchasing a home for the first time. 2- The Foreclosure Prevention Program, which provides assistance to prevent mortgage foreclosure and mitigate pending foreclosures, including Home Equity Conversion Mortgage (HECM). During the program year, the Housing Council provided direct counseling to 30 homeowners facing foreclosure, 6 of whom were referred to legal services for additional support. They also attended 10 public events as well as utilizing google ads, radio, and social media to get the word out about their services. 3 - Equal Housing Opportunities Program which provides training and intervention in landlord/tenant issues and fair housing information. During the 2020-21 program year, the Housing Council held 6 landlord education classes as well as 3 "renting 101" workshops with 43 people in attendance, they also fielded approximately 4,800 calls to their information hotline with inquires including housing options, tenant rights, and where to find rental assistance.

Monroe County also continued to fund Lifespan of Greater Rochester's Safety and Security for Seniors Program, which provides an array of services to older adults within suburban Monroe County including fall prevention and education and advice against fraud and scams. During the program year, Lifespan provided minor home repairs and fall prevention to 304 residents, including installation of grab bars, handrails, and shower seats with the goal of allowing seniors to age in place without the worry of injury or worse. LifeSpan also provided direct intervention for 43 seniors who had fallen victim to scams by giving advice and mediating with police, lawyers, and banks to try to retrieve the lost money. Over 370 seniors attended their scam prevention workshops held throughout the year where they received training to be able to discern a scam artist from a regular caller/visitor.

**Con't Assess how the jurisdiction's use of funds**

Also during the 2020-21 program year, Monroe County helped with the purchase of new equipment to support Lifetime Assistance (LAI) Classified Scanning and Shredding Program which provides employment to developmentally disabled individuals in Monroe County. The equipment purchased allows them to be competitive in the services they provide which in turn maintains the employment of their staff who would otherwise likely be unemployed and require additional supervised care. Lifetime Assistance maintained the employment of 8 individuals with the plan to hire 4 additional employees once COVID is less of a risk as most candidates for employment would be classified as immunocompromised. During the reporting period, Monroe County completed fourteen (14) public facilities and improvement projects throughout Monroe County. Projects were completed in the towns of Gates (2019-\$50,000), Hamlin (2018-\$65,000), Henrietta (2019-\$38,463.40; 2020-\$50,000), Penfield (2015-\$70,000; 2018-\$49,374.58) and Sweden (2019-\$68,000), town/village of East Rochester (2019-\$120,000) and in the villages of Fairport (2018-\$27,419.56), Hilton (2019-\$38,725), Scottsville (2018-\$21,338), and Webster (2019-\$87,478; 2020-\$67,410; 2020-\$90,000). For the development of affordable rental housing, \$100,000 of HOME funds were provided for the construction of Skyview Senior Apartments in the town of Irondequoit at the former Irondequoit Mall/Medley Center. This project adds 157 senior apartments (age 55+) including the frail elderly. One hundred and forty-three (143) 1-bedrooms, and fourteen (14) 2-bedroom units were constructed with one building being new construction and the second building being rehabilitated from a former department store into apartments, connected by a sky bridge. Construction at Skyview was completed September 2021, shortly after the 2020 program year. The project has begun lease-up with 100% lease-up estimated by April 2022. Monroe County also provided \$250,000 for the construction of fifty (50) new HOME units for Wellington North, 46-1 bedroom, and 4- 2 bedroom senior apartments ages 62+ in the town of Clarkson. This project's anticipated construction completion is early 2022. Through the acquisition rehab resale program, which was first implemented in the 2018 program year, three (3) single family homes have had construction completed during the program year, however, 1 project has not been vouchered during this program year and is not reflected in the IDIS. Monroe County invested \$135,794.24 of HOME funds for the rehabilitation of two vacant properties as well as \$16,000 of direct subsidies for closing costs and down payment assistance for the homebuyer. These projects leveraged a total of \$26,500. Due to the COVID-19 pandemic and the foreclosure moratorium, there were no home foreclosures and limited properties available for purchase. With the limited number of properties, the housing market was extremely competitive and even more challenging when having to bid for a property against a buyer in the fair market who resell the property without the same restrictions.

## CR-10 - Racial and Ethnic composition of families assisted

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

91.520(a)

|   | CDBG         | HOME      | ESG          |
|---|--------------|-----------|--------------|
| White                                     | 1,292        | 31        | 835          |
| Black or African American                 | 178          | 2         | 1,336        |
| Asian                                     | 8            | 6         | 15           |
| American Indian or American Native        | 3            | 0         | 20           |
| Native Hawaiian or Other Pacific Islander | 0            | 0         | 13           |
| <b>Total</b>                              | <b>1,481</b> | <b>39</b> | <b>2,219</b> |
| Hispanic                                  | 39           | 0         | 405          |
| Not Hispanic                              | 1,442        | 39        | 1,900        |

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

### Narrative



## CR-15 - Resources and Investments 91.520(a)

### Identify the resources made available

| Source of Funds | Source           | Resources Made Available | Amount Expended During Program Year |
|-----------------|------------------|--------------------------|-------------------------------------|
| CDBG            | public - federal | 1,887,703                | 1,792,556                           |
| HOME            | public - federal | 1,267,000                | 797,270                             |
| ESG             | public - federal | 161,462                  | 116,201                             |

**Table 3 - Resources Made Available**

### Narrative

### Identify the geographic distribution and location of investments

| Target Area                             | Planned Percentage of Allocation | Actual Percentage of Allocation | Narrative Description |
|---|----------------------------------|---------------------------------|-----------------------|
| Brighton                                |                                  |                                 |                       |
| Brockport                               |                                  |                                 |                       |
| Churchville                             |                                  |                                 |                       |
| East Rochester                          |                                  |                                 |                       |
| Fairport                                |                                  |                                 |                       |
| Gates                                   |                                  |                                 |                       |
| Henrietta                               |                                  |                                 |                       |
| Hilton                                  |                                  |                                 |                       |
| Monroe County Service Area block groups | 100                              |                                 |                       |
| Ogden                                   |                                  |                                 |                       |
| Parma                                   |                                  |                                 |                       |
| Penfield                                |                                  |                                 |                       |
| Perinton                                |                                  |                                 |                       |
| Pittsford                               |                                  |                                 |                       |
| Rush                                    |                                  |                                 |                       |
| Scottsville                             |                                  |                                 |                       |
| Sweden                                  |                                  |                                 |                       |
| Webster                                 |                                  |                                 |                       |

**Table 4 – Identify the geographic distribution and location of investments**

### Narrative

Table 4 –The above report does not include the towns of Greece (4%) and Irondequoit (7%), which is part of Monroe County’s Home Consortium.

The actual percentages of allocations listed in Table 4 include projects funded in previous program years but were completed and reimbursed during the 2020-21 program year.

Monroe County does not have publicly owned land or properties located within the jurisdiction where HUD funding was used during the program year.

## 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 HOME program attracts private and other public dollars to its funded projects and has leveraged other state, local, and private funding, which includes investor equity, tax credit syndicators, homebuyer down payments, private rental and homeownership loans, and other federal, state, and local housing and community development programs and foundations.

Monroe County carried forward \$5,004,057 from the previous program year. During this reporting period, Monroe County disbursed \$858,394 in total HOME funds. During this period, Monroe County earned \$34,315 in new match, which combined with the carryover difference, will allow Monroe County to carry forward \$4,823,774 in match for the 2022 federal fiscal year.

Match contributions for both HOME and ESG were matched with non-federal resources. Monroe County maintains records demonstrating compliance with HOME match requirements including a running log and project records documenting the type and amount of match contributions by project. Match contributions from ESG were a one-to-one (1:1) cash and/or in-kind match. Cash match were from fundraising, donations, and landlord tenant agreements through the Monroe County Department of Human Services for security deposits and 1st month's rent. In addition, there were in-kind match for staff time to follow-up with recipients.

Monroe County invested \$100,000 of HOME funds for the development of Skyview Senior Apartments in the town of Irondequoit for the addition of 157 affordable rental units (143-1 bedroom, 14-2 bedroom), six (6) of which are HOME units. These funds leveraged a total of \$44,085,512 for the construction of the project. Monroe County also invested \$250,000 for the development of Wellington North Senior Apartments in the town of Clarkson for the addition of 50 affordable rental units (46 – 1 bedroom, 4 – 2 bedroom) for ages 62 and up. These funds leveraged a total of \$15,783,225.

Through the acquisition rehab resale program, Monroe County invested \$135,794.24 of HOME funds for the rehabilitation of two vacant properties as well as \$16,000 of direct subsidies for closing costs and down payment assistance for the homebuyer. These projects leveraged a total of \$26,500.

Monroe County Planning and Development makes maximum use of its financial tools and

continues to develop programs that pool Community Development funds with other departmental resources for initiatives that serve low-and moderate- income persons in Monroe County. The Economic Development Loan and Grant fund, paired with County of Monroe Industrial Development Agency (COMIDA) and Monroe County Industrial Development Corporation (MCIDC) financing, provides funding for business start-ups, relocations from other areas, or those expanding in Monroe County.

| <b>Fiscal Year Summary – HOME Match</b>  |           |
|--|-----------|
| 1. Excess match from prior Federal fiscal year                                 | 5,004,057 |
| 2. Match contributed during current Federal fiscal year                        | 34,315    |
| 3. Total match available for current Federal fiscal year (Line 1 plus Line 2)  | 5,038,372 |
| 4. Match liability for current Federal fiscal year                             | 214,599   |
| 5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4) | 4,823,773 |

**Table 5 – Fiscal Year Summary - HOME Match Report**

| Match Contribution for the Federal Fiscal Year |                      |                            |                               |                              |                         |   |                |             |
|--|----------------------|----------------------------|-------------------------------|------------------------------|-------------------------|---|----------------|-------------|
| Project No. or Other ID                        | Date of Contribution | Cash (non-Federal sources) | Foregone Taxes, Fees, Charges | Appraised Land/Real Property | Required Infrastructure | Site Preparation, Construction Materials, Donated labor | Bond Financing | Total Match |
| 4428   | 12/10/2020           | 3,750                      | 0                             | 0                            | 0                       | 0   | 0              | 3,750       |
| 4439   | 01/22/2021           | 28,000                     | 0                             | 0                            | 0                       | 0   | 0              | 28,000      |
| 4440   | 01/22/2021           | 2,565                      | 0                             | 0                            | 0                       | 0   | 0              | 2,565       |

Table 6 – Match Contribution for the Federal Fiscal Year

**HOME MBE/WBE report**

| Program Income – Enter the program amounts for the reporting period |   |   |                                |  |
|---|---|---|--------------------------------|--|
| Balance on hand at begin-ning of reporting period<br>\$             | Amount received during reporting period<br>\$ | Total amount expended during reporting period<br>\$ | Amount expended for TBRA<br>\$ | Balance on hand at end of reporting period<br>\$ |
| 152,079   | 234,116                                       | 376,695   | 0                              | 9,500  |

Table 7 – Program Income

| <b>Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period</b> |            |                                   |                           |                    |          |                    |
|---|------------|-----------------------------------|---------------------------|--------------------|----------|--------------------|
|   | Total      | Minority Business Enterprises     |                           |                    |          | White Non-Hispanic |
|   |            | Alaskan Native or American Indian | Asian or Pacific Islander | Black Non-Hispanic | Hispanic |                    |
| <b>Contracts</b>  |            |                                   |                           |                    |          |                    |
| Dollar Amount   | 28,023,427 | 0                                 | 0                         | 0                  | 140,000  | 27,883,427         |
| Number  | 2          | 0                                 | 0                         | 0                  | 1        | 1                  |
| <b>Sub-Contracts</b>  |            |                                   |                           |                    |          |                    |
| Number  | 34         | 1                                 | 0                         | 5                  | 0        | 28                 |
| Dollar Amount   | 22,296,263 | 192,650                           | 0                         | 4,968,322          | 0        | 17,135,290         |
|   | Total      | Women Business Enterprises        | Male                      |                    |          |                    |
| <b>Contracts</b>  |            |                                   |                           |                    |          |                    |
| Dollar Amount   | 0          | 0                                 | 0                         |                    |          |                    |
| Number  | 0          | 0                                 | 0                         |                    |          |                    |
| <b>Sub-Contracts</b>  |            |                                   |                           |                    |          |                    |
| Number  | 7          | 7                                 | 0                         |                    |          |                    |
| Dollar Amount   | 2,912,524  | 2,912,524                         | 0                         |                    |          |                    |

**Table 8 - Minority Business and Women Business Enterprises**

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

**Table 9 – Minority Owners of Rental Property**

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

**Table 10 – Relocation and Real Property Acquisition**

## CR-20 - Affordable Housing 91.520(b)

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

|  | One-Year Goal | Actual     |
|--|---------------|------------|
| Number of Homeless households to be provided affordable housing units      | 75            | 161        |
| Number of Non-Homeless households to be provided affordable housing units  | 275           | 159        |
| Number of Special-Needs households to be provided affordable housing units | 35            | 0          |
| <b>Total</b>   | <b>385</b>    | <b>320</b> |

Table 11 – Number of Households

|  | One-Year Goal | Actual     |
|--|---------------|------------|
| Number of households supported through Rental Assistance             | 35            | 98         |
| Number of households supported through The Production of New Units   | 19            | 6          |
| Number of households supported through Rehab of Existing Units       | 60            | 54         |
| Number of households supported through Acquisition of Existing Units | 3             | 2          |
| <b>Total</b>   | <b>117</b>    | <b>160</b> |

Table 12 – Number of Households Supported

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

The impact of the pandemic continued into the 2020-21 program year, limiting operations of certain non-essential businesses, non-essential work, along with prohibitions on non-essential construction, which impacted majority of the work administered by Community Development and our contractors, subcontractors, subrecipients, and municipal partners. While the shut down was lifted, the reopening has seen material delays and price swings, labor shortages, and an overall uncertainty in the future, which had a tremendous impact on housing and the economy in Monroe County resulting in the lower



outcomes reflected in this report for CDBG and HOME impacted the outcomes of the 2020-21 program year.

Monroe County affordable rental housing projects rely on other funding sources for development. Skyview Senior Apartments in the town of Irondequoit leveraged \$44,085,512, which was new construction at 200 Medley Center Drive. The project was completed in September of 2021 with 157 senior apartments for ages 55+. Funding was also provided for the construction of Wellington North in the town of Clarkson. Wellington North is currently under construction with anticipated completion in early 2022. Timing of the projects are attributed to the timing of the leveraged funds becoming available, improved efficiency, and coordination with other municipalities, partners, developers, and service providers.

During this reporting period, the acquisition rehab resale program completed construction of three (3) single family residential properties, making them available for purchase by income eligible first time homebuyers. The properties were located in the towns of Gates and Irondequoit. The third property was completed in the town of Greece. However, the homebuyer closing for this property did not occur until after the program year and will be reported in the next CAPER. The housing market continued to be a competitive market. Due to the foreclosure moratorium, there has been a limited supply of properties available for purchase. At the end of the program year, there are no pending projects in the pipeline. However, we are continuously seeking new opportunities to make the dream of purchasing a home possible for first time homebuyers, which has been challenging when bidding on properties against market rate buyers and house flippers.

**Discuss how these outcomes will impact future annual action plans.**

Monroe County Community Development (CD) continues to identify opportunities to increase coordination and efficiencies for timelier project completion.

The impact of the pandemic and the additional COVID variants have continued to impact our outcomes, from the competitive housing market to the lack of available homes for purchase, the increased costs of construction supplies, the lack of workers, and the delay in manufacturing of these construction products have all contributed to the completion of projects.

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

| Number of Households Served | CDBG Actual | HOME Actual |
|-----------------------------|-------------|-------------|
| Extremely Low-income        | 6           | 4           |
| Low-income                  | 17          | 16          |
| Moderate-income             | 10          | 10          |
| <b>Total</b>                | <b>33</b>   | <b>30</b>   |

**Table 13 – Number of Households Served**

## **Narrative Information**

The outcomes above reflect incomes of the Home Improvement Program (HIP) participants and the First Time Homebuyer (FTHB) activities during the 2020-2021 program year.

**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**

During the 2020-2021 program year, Monroe County continued funding the Housing Council at PathStone for foreclosure prevention services and tenant accountability training. This included counseling, education, and renegotiating with lenders and other parties for appropriate resolutions. The Emergency Solutions Grants (ESG) focused on rapid re-housing as well as a community-wide Coordinated Entry system and homelessness prevention.

Assistance was provided under the Rapid Rehousing Partnership Program (RRH) to 308 persons (169 adults and 139 children). Activities included short term rental assistance, rental arrears, and security deposits. Non-financial assistance included housing relocation and stabilization services such as housing search, mediation, or outreach to property owners, and time-limited housing stability case management services to assist households in maintaining stable permanent housing. The average length of time to secure housing was 52 days. 73% of participants exited to permanent housing; 85% for households with children and 53% for individuals.

The Coordinated Entry system has been fully implemented throughout the CoC geographic area. The primary entry points for Emergency are Monroe County DHS allowing for assessment of homeless situation/need, diversion services, or 24/7 placement services. The goal of Coordinated Entry is to ensure that emergency shelter is available to all in need and that homeless persons are linked to the housing and services that will best meet their needs. Permanent Supportive and Rapid Rehousing programs are accessed through the Coordinated Entry prioritization list. A vulnerability assessment tool, the VSPDAT, is administered at emergency shelters, through street outreach activities and at community-based organizations that have interactions with the homeless. The VSPDAT score and other factors such as disability, age (<18 or="">60), length of time homeless and being unsheltered are used to determine placement on the list. The list is fluid, when openings are available the list is sorted by score to ensure that the people referred are those with the highest needs. 1,634 households were placed on the prioritization list from 8.1.2020 – 7.31.2021. 1,486 were exited from the wait list; 148 were still active on the list. The CoC is working on replacing the VSPDAT tool as the assessment tool for Coordinated Entry. It is no longer being supported by its developer.

Monroe County provides Emergency Solutions Grant (ESG) funding to HOPE Ministries located in the town of Webster provided homelessness prevention assistance with rental arrears, utility payments, and security deposits for suburban residents. Assistance was provided to 115 persons; 48 individuals and 27 households with children (30 adults and 37 children) received homeless prevention assistance. Catholic Family Center (CFC) also receives County ESG funding for prevention services. CFC's program provided

assistance to 104 persons; 17 individuals and 31 households with children (31 adults and 56 children.)

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

Monroe County and the City of Rochester continued our collaboration efforts to fund the community-wide Coordinated Entry system and the Rapid Rehousing Partnership to maximize community resources to move homeless households from shelter/temporary housing to permanent housing as quickly as possible. These programs are coordinated and collaborated with various area service providers, including the Monroe County Department of Human Services (DHS), to better serve those in the emergency shelters; provide workshops for landlords and potential landlords to educate them to DHS processes and utilizing the landlord-tenant agreement in lieu of cash security deposits; and continually work to increase the supply of safe, affordable housing units for homeless and other special needs populations. Coordinated entry is utilizing the VSPDAT, a vulnerability assessment tool to assess an individual's needs and insure that homeless households with the highest needs are prioritized in our community's permanent supportive housing programs. Insuring that the housing and service needs of homeless households are addressed will lead to increased housing stability and decrease the number of repeat episodes of homelessness.

To address prevention of the spread of COVID-19; the Monroe County DHS placed 63 homeless persons in hotels to allow shelters to operate within social distancing guidelines. Dormitory style shelters and the unsheltered homeless were prioritized for the hotel placements; those individuals that were at high risk for COVID-19 based on age and/or chronic health conditions and made them more vulnerable. This proved to be successful. There were minimal COVID outbreaks in the homeless system and only two shelters had to stop new admissions for two weeks so people could be safely quarantined.

In addition to the hotel placements made, the Shelter Task Force continued its work to address COVID related issues. The Task Force updated the guidebook for shelters and other homeless providers to follow guidance on screening at admission, sanitation, use of Personal Protective Equipment (PPE), how to quarantine within the shelter, and how to facilitate moving a person from shelter to isolation, if needed. The focus of the Task Force's work this year was on education and coordination of COVID-19 vaccinations for the homeless system and incorporating the COVID work into the overall emergency response system to guide efforts in the future should the need arise.

### **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**

The increased collaboration and coordination between systems, i.e. -homeless, health care, behavioral health, etc., has improved efficiency in serving those being discharged from mental health facilities,

corrections programs, victims of domestic violence, veterans, and the chronically homeless. Health home care coordinators, re-entry task force case managers, and other community based organizations work together to ensure that discharge plans include a housing plan to prevent persons from exiting institutions to homelessness. On occasions when persons are discharged to the homeless system, the systems are working together to ensure that households are transitioned to permanent housing as quickly as possible.

The Monroe County Department of Human Services (MCDHS) Diversion Unit continues to assist those at risk of homelessness with payment for such costs as mortgage payments, auto repairs, and tools/uniforms for jobs. Returns to homelessness have decreased with less stringent compliance demands and automatic lease renewals.

**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**

Monroe County continued funding Coordinated Entry which is being fully implemented throughout the CoC geographic area. ESG funded emergency shelters and street outreach programs administer the VSPDAT, a vulnerability assessment tool, to all participants. Coordinated Entry will use VSPDAT scores and other criteria to compile a prioritization list by name that will ensure that the chronically homeless and other homeless persons with the highest needs are prioritized for Permanent Supportive Housing (PSH) and Rapid Rehousing (RRH) programs. The CoC encourages all permanent housing programs to utilize Housing First and harm reduction principles that reduce barriers to accessing permanent housing and provide the appropriate level of services to meet the needs of high need individuals. Written standards have been developed and accepted by all persons that include performance measures that seek to reduce the length of homeless episodes, to be more efficient in housing search and placement activities, make linkages of mainstream resources for income supports, health insurance, housing subsidies, etc.

The CoC provided guidance and support to the PSH and RRH housing programs at the onset of the COVID crisis in how to continue with ongoing operations and support to participants remotely, encouraging virtual showing of units, etc. Guidance was also provided to programs on the waivers made available through HUD to facilitate new admissions into housing during COVID; i.e. – conducting virtual inspections, option of month to month leases, and other incentives for landlords to provide units for PSH and RRH programs.

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

### **Actions taken to address the needs of public housing**

Coordination between the Rochester Housing Authority (RHA), the Fairport Urban Renewal Agency (FURA), private and governmental health and mental health service agencies are enhanced through the county's support of RHA and FURA social services programs. RHA and FURA offer programs to lessen the impediments for low-income families to move to higher income areas within Monroe County, such as Project Based vouchers, security deposit assistance, higher payment standards for low-poverty areas, assistance in finding suitable housing, and landlord outreach.

RHA continues its planning efforts to preserve and increase the inventory of RHA-owned or controlled properties and grow their financial assets. One objective is to transform public housing properties, which have been identified through the HUD Rental Assistance Demonstration (RAD) program and other means as practical, by developing RHA owned properties into mixed-income and multi-family housing, and to develop resources to improve the quality of existing housing stock. RHA plans on accomplishing these goals using property needs assessments, resident input, finalizing and submitting financial information to HUD and identifying and prioritizing additional qualifying properties for transition through RAD. Currently, RHA is working on three RAD projects, and one is combined with an affordable housing project. RHA, along with its development partner, has applied for the NYS HCR Summer 2021 Multifamily Finance 9% RFP round for the redevelopment of its Federal St site and/or new construction of an additional 35 scattered site units. RHA is creating a "pipeline" of projects that will require LIHTC funding. Last year, RHA was awarded a grant as part of the NYS Preservation Opportunity Program (NYS-POP) through NYS and Enterprise, which enables RHA to conduct property needs assessments on properties to identify needs to assist in the prioritization of capital improvement projects. Incorporating stakeholder input into strategies and actions to determine priorities will also be part of this process. This effort is well under way and both physical and environmental assessments are in progress currently with financing and resident engagement opportunities in the works.

RHA continues to utilize its Capital Fund Program awards to address capital needs at its public housing properties. RHA's Resident Advisory Board along with RHA staff meets annually to develop an annual and comprehensive 5-year plan for capital improvements that address the needs of their properties and the needs of the residents. Resident Advisory Board and staff meet on a regular basis to update and prioritize those needs. RHA meets with property management and maintenance staff quarterly to prioritize and address projects.

Although the Fairport Urban Renewal Agency (FURA) does not administer any public housing units, the agency does provide Section 8 vouchers to 497 low-income families and individuals. Section 8 rental assistance is provided in a number of affordable housing projects funded by Monroe County HOME funds. Recently, FURA awarded 28 new Project Based Vouchers (PBV) to two leading housing developers in the area. 20 PBV were awarded to Rochester's Cornerstone Group for a proposed senior housing

project in Henrietta and 8 were awarded to PathStone for senior housing in Fairport.

### **Con't Actions taken to address needs of public housing**

There continues to be a significant need in FURA program service area for housing. Long waiting lists and stringent eligibility requirements enforced by the larger apartment complexes were a significant impediment to achieving housing in the area. Other factors, including high rents and a steady decline in the pool of property owners accepting Section 8, were also significant barriers for tenants seeking permanent housing. In an effort to create more affordable housing opportunities and reduce the barriers to finding suitable housing, FURA increased the 2020-2021 payment standards to 110% of the Fair Market Rent (10% increase from the previous year). FURA will continue to review the payment standards annually and will adjust accordingly. It is the agency's intention to continue to offer payment standards above 100% of the FMR in an effort to remain competitive with the existing private rental market. At this time, FURA Section 8 waiting list includes just over 800 applicants. The waiting list had opened in January of 2019 and closed in May 2020. Typically, this office closes the list when it reaches enough applicants to fill available vouchers for two years. The Agency is able to provide approximately 70 new families with rental assistance through the Section 8 program per year. The lack of affordable housing poses a challenge for these families and often vouchers go unutilized because families cannot locate housing. The Town of Perinton and the Village of Fairport are in the process of/or are finalizing their Comprehensive Planning process. The topic of affordable housing is being addressed and should be a part of both documents. The Town has identified that there is a housing shortage for certain demographics due to high occupancy and limited supply. This demand for housing results in high rents throughout the area that is a significant barrier to families looking for affordable housing. The Plan supports multi-family housing construction and believes it is sustainable through the next twenty years due to the changing demographic in the community.

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

RHA is committed to improving communication between management, RHA residents, and program participants, and continues to work with area partners to provide services. RHA will continue to develop and promote RHA's Section 3 program, resident councils, and advisory board. RHA continues to encourage and support residents in organizing and participating in resident councils. There are currently 10 sites that have active resident councils and one jurisdiction-wide resident council that represents all residents. The council presidents are members of the RHA Resident Advisory Board and work with management in developing and revising the 5-year agency plan, annual operating budget, capital fund budgets, and occupancy policies. RHA has two Resident Commissioners on its Board who bring a lot of value to the organization as they routinely go around to sites and speak to residents and bring their concerns and kudos to management and the Board. They are both included in many planning activities throughout the year. RHA has established a Resident Relations Committee that meets monthly to discuss resident concerns and management issues. Collaboration on resident safety initiatives, services available, and additional services needed are all part of the discussions.

The Rochester Housing Authority's Resident Services Department has partnered with the City of Rochester's Financial Empowerment Center to provide free financial counseling for residents to equip them with skills in budgeting, money management, and credit repair. This program is exhibiting success as many referrals are being made. RHA's collaboration with NACA, the Housing Council at PathStone, and Neighborworks provides residents with homebuyer counseling, so they gain the tools and resources to make informed home buying decisions.

Resident Services staff provides families with on-going service coordination to help them achieve goals of self-sufficiency. Barriers to the achievement of those goals are identified and addressed through referrals to various community agencies that can help the family to improve or maintain their independence.

RHA's Resident Services department continues to assist with resident needs and actively engage in homeownership opportunities and self-sufficiency program development. On September 12, 2000, HUD published the final rule for the Homeownership Voucher Program adding the homeownership option to the existing tenant-based voucher assistance program. The homeownership option allows public housing authorities to subsidize the family's mortgage instead of rent. The maximum length of assistance is 15 years if the initial mortgage of the home has a term of 20 years or longer. For a mortgage term of fewer than 20 years, the maximum term of assistance is 10 years. There is no maximum assistance term for disabled and elderly families provided they maintain program eligibility. RHA has begun its Section 32 Homeownership program where Public Housing Residents can purchase a Public Housing home. Current residents will be given first option to purchase the home. RHA may use capital funds and/or operating reserves to renovate designated public homeownership plan that will include Section 32 Homeownership homes. Currently, RHA has 7 Public Housing residents who are eligible to purchase their home and RHA is preparing its application that will be submitted to the HUD Special Applications Center (SAC). RHA has another 23 residents in various stages of becoming eligible to purchase their Public Housing home.

### **Con't Actions taken to encourage public housing residents**

RHA is developing a post homeownership program to assist families in maintaining their homes and ensuring homeowners that they have somewhere to go for assistance when they need it. RHA intends to increase utilization of homeownership vouchers and increase outreach efforts. RHA's first homeowner closed on their home in 2001. To date, 230 people have purchased their own home, with 13 this past year. RHA continues to develop and promote its Section 3 program for residents, participants, and businesses. FURA does not administer Homeownership vouchers but does operate a Family Self Sufficiency program. 65% of the families enrolled have an escrow account and 100% percent are making significant progress toward meeting their goals, including homeownership. Participants with homeownership as a goal are encouraged to seek private lending institutions that offer first time homebuyer programs as we do not offer this service. FURA has a Resident Advisory Board that meet annually to review agency progress, advice on policies, budgets, and agency plans.



## **Actions taken to provide assistance to troubled PHAs**

The Rochester Housing Authority and the Fairport Urban Renewal Agency are not a troubled public housing authority.

## **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)**

Monroe County's Department of Planning and Development conducts training sessions every fall and spring to support Land Use Decision-Making in Monroe County. These workshops offer fundamentals on Land Use Planning and Zoning, the NYS Environmental Quality Review Act, and Land Use Law. The Land Use Law session contains a brief overview of laws related to affordable housing, inclusionary zoning, and exclusionary zoning. These trainings are open to anyone, and we generally offer discounts for those in financial need, non-profit employees, veterans, and others upon request. However, due to the COVID-19 Pandemic and social distancing measures we are hosting virtual sessions that are free to all attendees and expect robust attendance. The Department also administers the review of municipal law revisions, rezoning, and site plan and subdivision applications and regularly comments on measures to improve zoning ordinances, land use controls, and site plans.

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

The greatest obstacle to meeting underserved needs continues to be limited CDBG, HOME, and ESG program funds. The demand for resources and housing, as the cost to rehab and/or purchase a home is increasing rapidly, particularly in the area of community services and the cap on public services limit the ability for Monroe County to provide additional funds to meet the demands. As previously mentioned, in the 2020-21 program year, CDBG funding was provided to continue support of LifeSpan's Safety and Security for Seniors Program. LifeSpan provided 304 income eligible senior households with minor home repairs and fall safety features so they may continue to age in place. Some of these items include, shower grab bars, transfer benches for tubs, shower chairs, raised toilet seats, smoke detectors, and fire extinguishers. Forty Three (43) seniors received direct scam intervention (a sharp increase from the twenty five (25) seniors last year, with everything from help contacting the police and/or LawNY, reporting to the FTC, having their contact info added to the no call list and more. During the course of the year the program also provided direct education to over 370 seniors to help them avoid falling victim to predators. Below is another real world example of a senior in our community who was effected by a scammer and subsequently given assistance through the program: Below are examples provided by Lifespan of a victim of fraud who they were able to assist: "Female, 74 years old – Victim was scammed out of money with a check scam which started from a text on her phone. The victim lost thousands after depositing a check she received and sending out a written check for thousands of dollars only to find out the check (she deposited) was fake. The victim was signed up for the "Do Not Call Registry" at FTC.gov and a fraud report was completed at the same time with FTC.gov by a case manager. The victim was directed to change to a different banking institution after a talk with LawNY in an attempt to save her assets."

“Female, widow, age 75 – Client was victim to “The Grandparent Scam” which involves being told a grandchild is in trouble with the law and has been arrested. Client was convinced to pay \$15,000 in bail money by placing cash in a box and handing it someone at her front door claiming to be a bail bondsman. The client then sent another \$15,000 via wire transfer. The client was assisted in filing a claim with the NYS Office of Victim Services. The client also received extensive training and information of scams and tactics used by scammers.”

### **Con't Actions aken to address obstacles to meeting underserved needs**

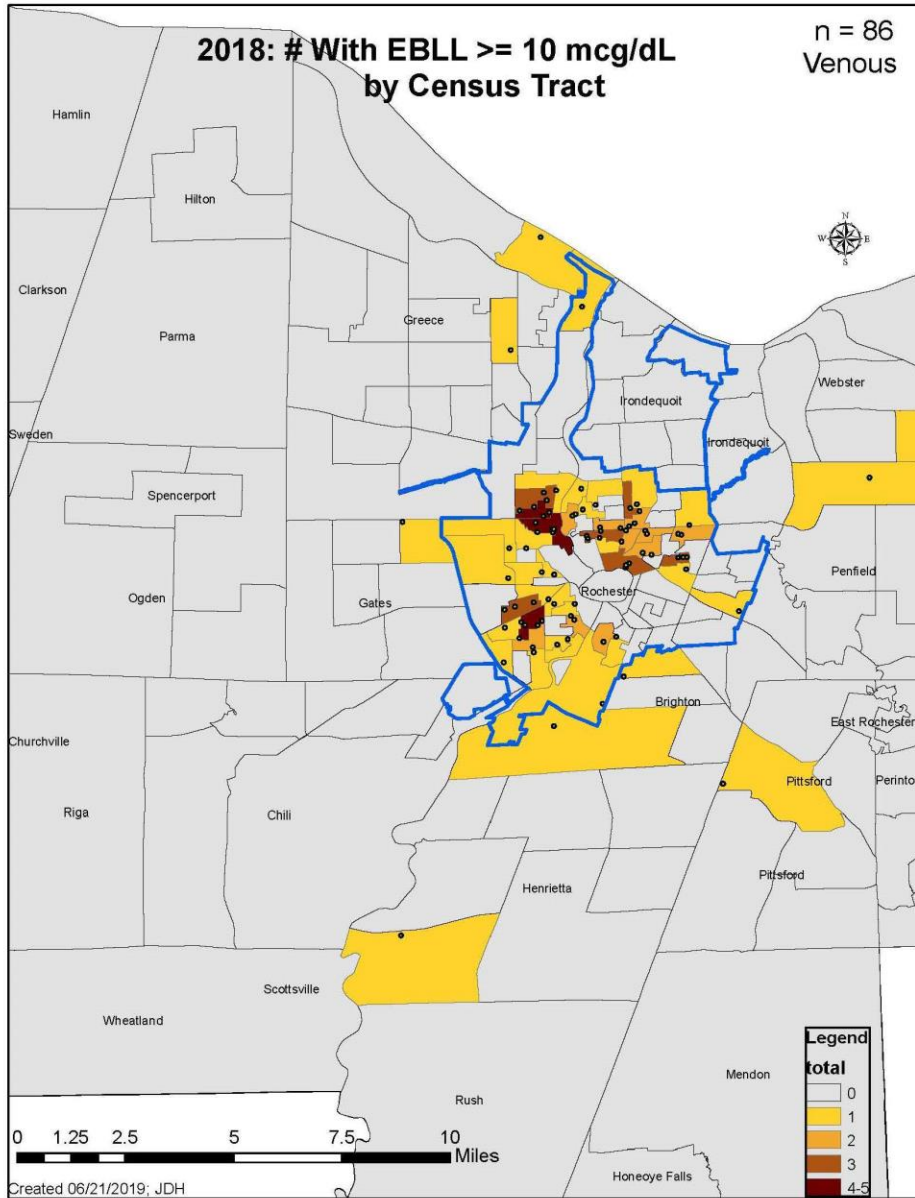
Monroe County also provided ESG funds to HOPE Ministry and the Catholic Family Center for Homelessness Prevention with direct financial assistance. Through Coordinated Care Services, Inc. we were able to provide Rapid Rehousing services, and Coordinated Entry services to our community. Coordinated Care services are in coordination with our Partners Ending Homelessness (PEH) team in Monroe County. We have been fortunate to partner with Person Centered Housing Option (PCHO), which provides Street Outreach services within our community. PCHO does case management and develops relationships with some of our most vulnerable populations. Finally, we provided funding to the Center for Youth to provide shelter for our marginalized youth.

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

The Childhood Lead Poisoning Primary Prevention Program also relies on grant funding from New York much like the secondary prevention grant. The previous 5 year funding cycle which ended 3/31/20 yielded approximately 875 inspections that were conducted in target units (housing with children <6 years="" old="" includes="" ebl="" 5-14="" 5="" pregnant="" women="" infants="" adjacent="" units="" with="" dhs="" clients="" or="" refugees="" to="" ensure="" the="" properties="" are="" lead="" safe="" residents="" and="" owners="" of="" these="" were="" educated="" in="" poisoning="" prevention="" other="" environmental="" health="" hazards="" their="" homes="" including="" asthma="" triggers="" mold="" pest="" infestation="" fire="" safety="" carbon="" monoxide="" injury="" during="" grant="" period="" 8="" 1="" 19="" 7="" 31="" 20="" monroe="" county="" department="" public="" contracts="" nys="" for="" primary="" secondary="" programs="" have="" ended="" about="" be="" ending="" year="" effects="" covid-19="" pandemic="" hitting="" early="" march="" some="" uncertainty="" exists="" surrounding="" details="" future="" funding="" however="" an="" 18="" month="" prorated="" contract="" level="" may="" vehicle="" used="" continue="" both="" new="" york="" state="" has="" adopted="" a="" standard="" that="" redefines="" blood="" child="" considered="" poisoned="" also="" requires="" medical="" case="" management="" as="" october="" 2019="" confirmed="" ug="" pb="" dl="" more="" will="" require="" elevated="" investigation="" at="" residence="" any="" place="" where="" they="" spend="" 8-10="" hours="" per="" week="" this="" is="" especially="" important="" because="" research="" continues="" show="" from="" lower="" levels="" can="" cause="" permanent="" irreversible="" harm="" beginning="" 2017="" began="" tracking="" eblls="" which="" today="" please="" refer="" attached="" maps="" number="" children="" above="" current="" nysdoh="" center="" disease="" control="" cdc="" reference="" city="" rochester="" border="" shown="" purple="" local="" data="" residing="" outside="" risk="" value="" supports="" continued=""

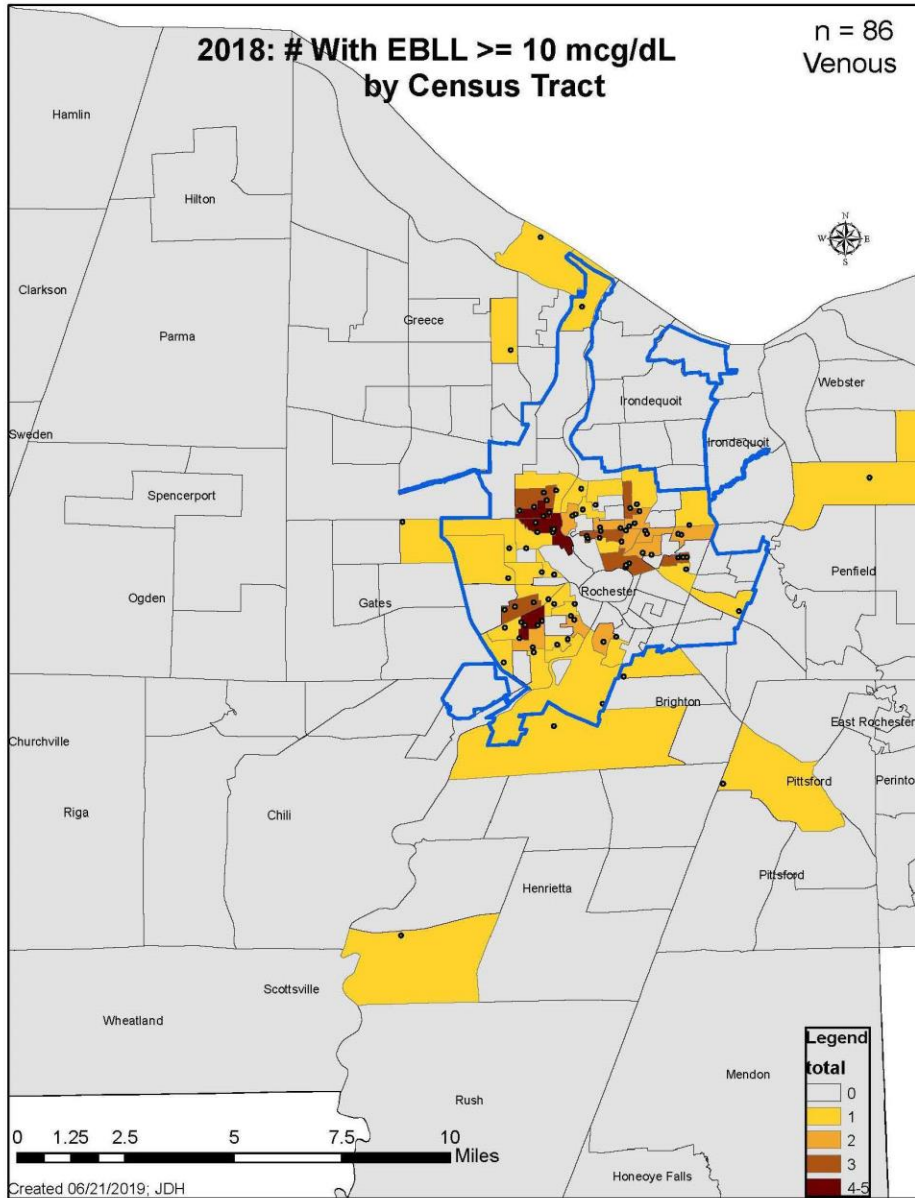
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Since the last reporting period both Monroe County Childhood lead poisoning prevention programs experienced a serious shut down due to Covid – 19. In March of 2020 all Health Department staff were reassigned to the Covid -19 emergency response. Private sector screening of children did continue via child health care providers and the subsequent blood lead level reporting continued. Screening remained fairly level and medical case management services were at a minimum. There was a brief period late in 2020 where inspection activity resumed but the rise in the Covid 19 variant again pulled staff away. Thru the winter of 20/21, case by case medical case management and inspection services continue and were limited thru the remainder of the reporting period.



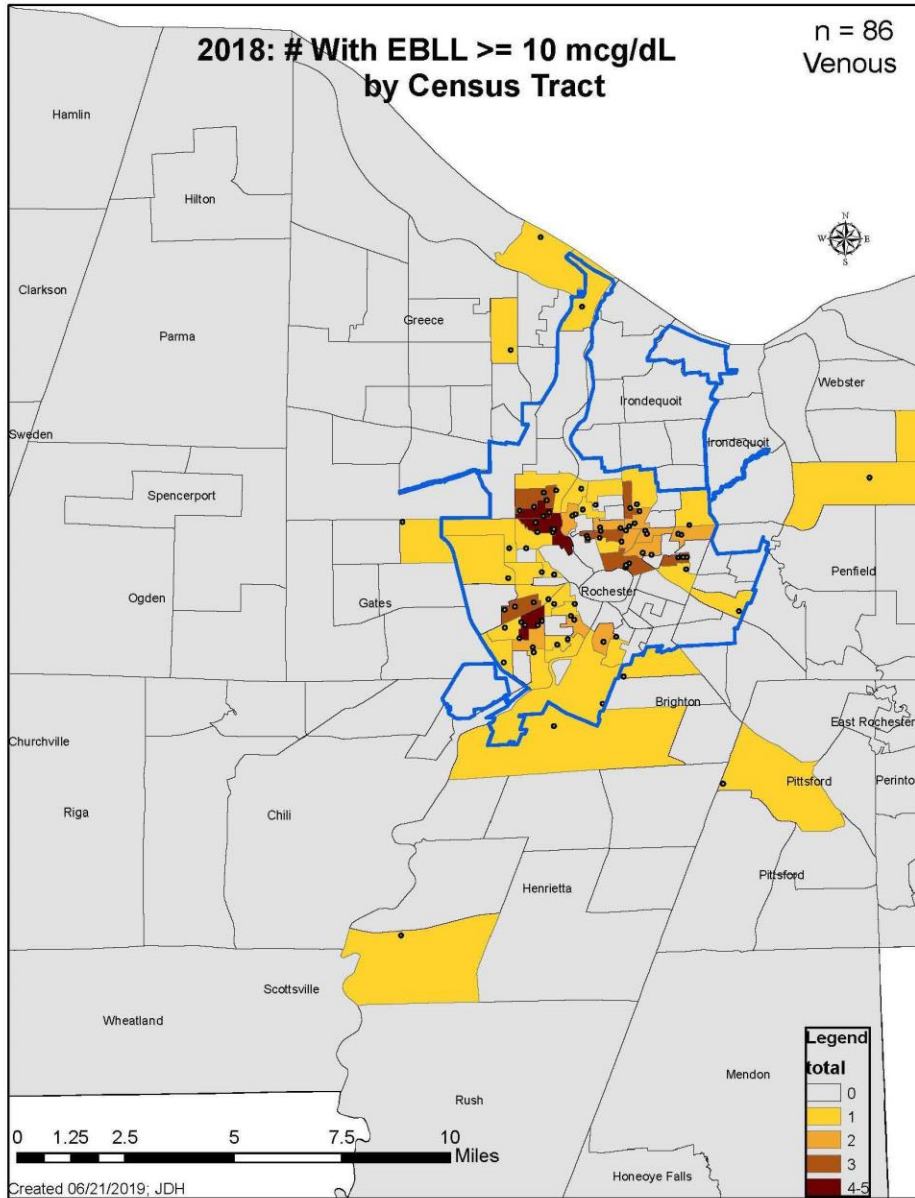
2018 All Zips Greater than 10

2017 5to9 Venous



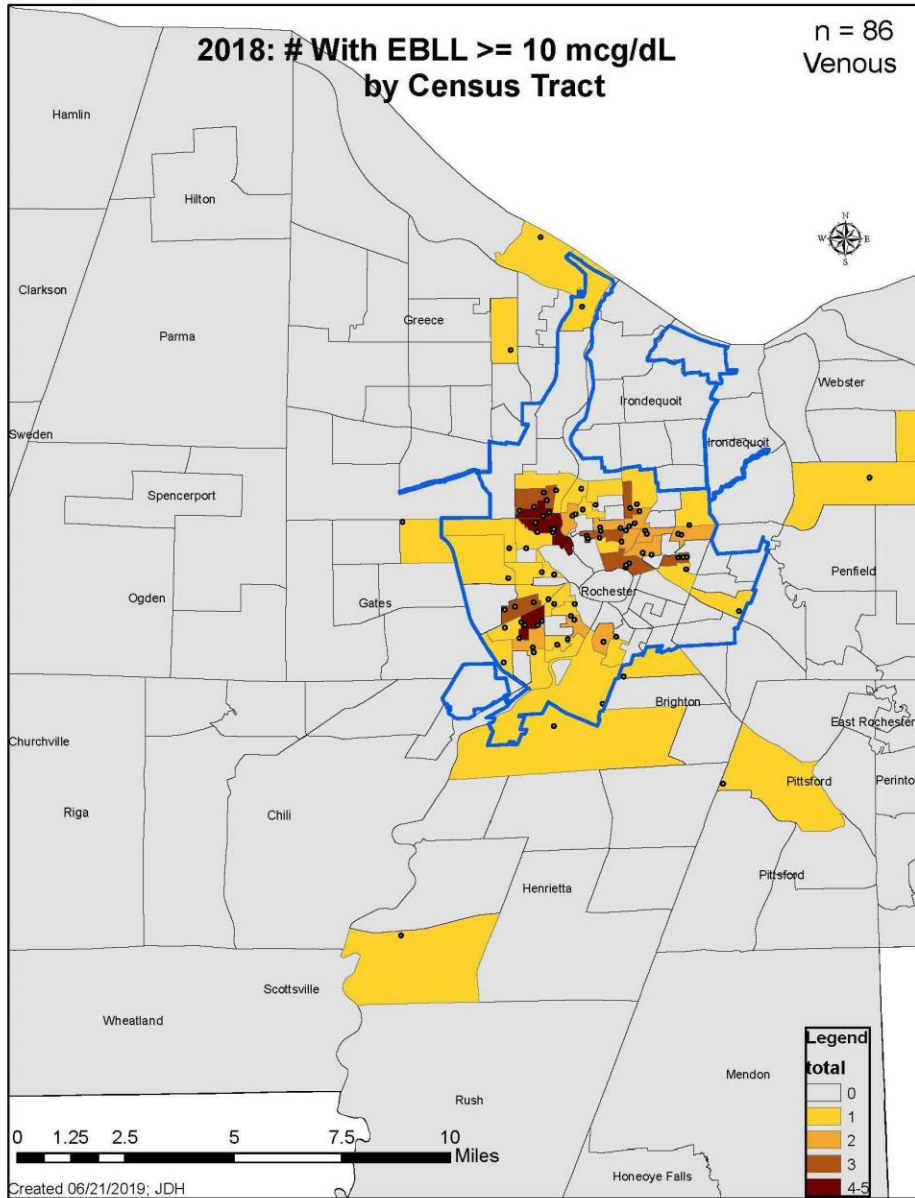
**2018 All Zips Greater than 10**

**2017 All Zips Greater than 10**



**2018 All Zips Greater than 10**

**2018 5to9 Venous**



**2018 All Zips Greater than 10**

**2018 All Zips Greater than 10**

**Actions taken to reduce lead-based paint hazards**



For period 8/1/20 thru 7/31/21 - Number of children referred with BLL 20+ ug/dl 25; Number of children referred with BLL 15 - < 20 ug/dl 27; Number of children referred with BLL 10 - < 15 ug/dl 42; Number of children referred with BLL 5 - < 10 ug/dl 120; Number of referred dwelling with BLL 20+ ug/dl 13; Number of referred dwelling with BLL 15 - < 20 ug/dl 10; Number of referred dwelling with BLL 10 - < 15 ug/dl 26; Number of referred dwelling with BLL 5 - < 10 ug/dl 112; Number of dwellings assessed 215; Number of primary dwellings assessed 199; Number of secondary dwellings assessed 9; Number of dwellings with at least one lead hazard found 111; Number of dwellings completed and cleared 47. Despite staffing and funding shortfalls thru 7/31/21 case management and environmental elevated blood lead level inspections occurred and no hospitalizations were reported.

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

Strategies implemented in 2016 to mitigate the number of people living below the poverty level in Monroe County included the continuation of existing programs that promote a stable living environment and reduce dependency and poverty primarily caused by unemployment, underemployment, housing conditions, and cost burden. Programs that address a stable living environment include the Home Improvement Program, the Homeownership Program, Expanding Housing Opportunities, Foreclosure Prevention and Home Equity Conversion Mortgage (HECM) counseling. In addition, many of the public facilities projects promote a stable living environment by reducing the cost burden placed on municipalities to make these improvements thereby reducing the costs passed on to local taxpayers. We also funded non-profit organizations to employ low income individuals through our public service program to promote an increase in wealth and reduce poverty. Lifetime Assistance's (LAI) Classified Scanning and Shredding business is a prime example. Monroe County utilized CDBG funding to support LAI to hire and maintain the employment of a number of developmentally disabled individuals who would otherwise be unemployed. LAI's business model allows for their employees to work at a pace that is comfortable while making a living in the process, with the additional benefit of reducing the cost burden for the care that would be required to support them being at home if they were not working, which is the largest expense facing any family with a member who is developmentally disabled. HESG funds were allocated to four (4) agencies, administering five (5) programs to provide critical services to homeless and at-risk individuals and families. Collectively these programs helped prevent homelessness, financial hardship, institutionalization, and poverty.

Monroe County Department of Human Services is the primary provider of public assistance benefits for poverty-level persons, and, therefore, has the greatest capacity to reduce the number of poverty-level families. Housing efforts, particularly emergency housing, are coordinated with the Continuum of Care (CoC) and other community-wide affordable housing agencies.

The Rochester/Monroe Anti-Poverty Initiative (RMAPI) formed a Housing workgroup to support community partners who are working on issues of affordable housing, and improving the existing housing stock. RMAPI has focused activities on increasing employment opportunities that pay a living wage, and has supported advocacy efforts to support child tax credit increases, increase child care

credit, and ending the practice of suspending driver's licenses for unpaid tickets.

The Monroe County Department of Human Services funded a program with the Rochester Rehabilitation Center named Paths to Empowerment Program that assists families with transitioning from reliance on public benefits to employment. The program provides linkages to community based services such as child care, transportation assistance, etc., that will increase employment stability. In addition, services are available offer programming on financial literacy, soft skills, and other resources.

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

Community Development works closely with all applicable public, private, and government entities within Monroe County organizational structure, as well as continues to strengthen and expand existing public and private sector coordination, enhance collaboration, and communication, improve program delivery, and identify and build innovative partnerships throughout our community.

During the 2020-21 program year, Monroe County staff continue to participate in the Continuum of Care (CoC), locally renamed Partners Ending Homelessness in 2019. Staff participates on the Administrative Board and CoC subcommittees: Budget/Adhoc/Finance Subcommittees, Chronically Homeless Workgroup, and the Homeless Services Network meetings, including the ranking and rating committee for this years applications to HUD for CoC funding Due to COVID, meetings have been held remotely since the pandemic in early 2020.

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

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

Monroe County strives to remain proactive about providing fair housing options. In order to understand current potential impediments to fair housing choice, Monroe County conducted an analysis of impediments to fair housing choice. This process involved analysis of demographic and housing data, public engagement on multiple occasions, on multiple platforms and venues, and the collaboration of numerous municipalities working toward the goal of understanding fair housing in suburban Monroe County.

The Civil Rights Act of 1968, Title VIII, commonly known as the Fair Housing Act of 1968 (42 U.S.C. 3601) states that it is the policy of the United States to provide fair housing throughout the country. This Act prohibits discrimination in the sale or rental of housing, as well as the provision of financing or

brokerage services, including denying or otherwise making unavailable a dwelling to any person because of race, color, religion, sex, national origin, disability, or familial status.

Nationally, fair housing practices and impediments to fair housing are monitored by the US Department of Housing & Urban Development (HUD). HUD's fundamental fair housing goal is advancing fair housing choice through proactive planning and intervention. The Department of Housing and Urban Development mandates fair housing planning as part of the Community Development Block Grant (CDBG) and Home Investment Partnership Program (HOME) requirements. Each grantee that receives CDBG/HOME funding under Title I of the Housing & Community Development Act is required to further fair housing and fair housing planning by conducting an analysis of impediments to fair housing choice in areas within their jurisdiction. The grantee is also required to take appropriate actions to overcome the effects of any impediments identified and maintain records that record and reflect the analysis and actions taken in this regard.

Monroe County is taking the appropriate steps to ensure that its analysis of impediments to fair housing choice and fair housing plans remain up-to-date and relevant living documents. The County recently finalized its 2020 update to the Monroe County Analysis of Impediments to Fair Housing Choice document. The updated document incorporates the most current available data on demographics and mortgage originations from multiple sources to provide a comprehensive snapshot of long term and emerging trends that may impact access to housing choice. This document not only allows the County to identify existing impediments but also provides a metric to track progress made in affirmatively furthering fair housing.

The Monroe County Fair Housing Action Plan eliminates barriers to affordable housing choice by laying out priority areas including the provision of fair housing education and outreach; increasing the supply of assisted housing; promotion of sustainable minority homeownership; and expansion of appropriate housing opportunities for minorities, seniors, persons with disabilities, and homeless populations. For each priority area, the Plan establishes four (4) basic strategies to address these issues.

Monroe County continues to offer their annual land-use decision making classes. These classes address issues that planning and zoning board members may face, including applications concerning site and land use planning issues relating to the development of affordable housing.

### **Con't Identify actions taken to overcome the effects of impediments identified**

There are a variety of real estate listing websites operating in Monroe County, including public-facing websites such as Zillow, Trulia, Homefinder, homes.com, and HomesteadNet, among others. The primary internet source for detailed information on properties listed for sale in the greater Rochester and Finger Lakes region is HomesteadNet, owned by the Greater Rochester Association of Realtors (GRAR). GRAR continues to take steps to advertise HomesteadNet broadly and has added the ability for housing choice for buyers to get contact information for individual realtors based on language, thereby enhancing housing choice for buyers with limited English proficiency. GRAR is committed to inclusive

advertising practices and uses diverse human models to reflect the diversity of this community. The Monroe County Fair Housing Action Plan is also designed to increase and sustain first-time homebuyers in the private market, paying particular attention to an increasing diverse population of homeowners in Monroe County. The Home Ownership Assistance program, administered by the Housing Council at PathStone provided counseling education, referral, and financial assistance to low-income persons in Monroe County trying to buy a home.

## **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**

Monroe County Community Development (CD) conducts on-site monitoring visits on an annual basis for all CDBG, HOME, and ESG funded programs and projects to ensure that contractors and subrecipients are performing programs and projects in accordance with applicable laws and regulations and that performance goals are met. CD monitoring strategy for the CDBG, HOME, and ESG programs consists of the use of standard Monroe County financial standards, systems, and procedures to ensure accuracy. These serve as a guide to successfully measure fiscal, regulatory, and programmatic performance, and compliance of all activities identified in the Consolidated Plan. The policies also apply to the activities of the HOME program to provide the most effective methods of reviewing, evaluating, and monitoring the performance of all sub-grantees, project elements, and source documentation, employee payroll/timecards, income eligibility, and overall compliance of program budgets. CD staff are in constant communication with contractors, subgrantees and subrecipients throughout project construction and program implementation to ensure that projects are completed within the agreed upon time frame, environmental reviews are completed, as needed, and programs are completed based on approved scope of services.

CD staff conduct on-site monitoring for all CDBG public services and ESG funded projects, reviewing client files, randomly selected to ensure that all participants meet the income and program guidelines. We also require each of the Public Services and ESG recipients to supply a report that includes up to date performance measures and year to date totals periodically throughout the year to allow for continuous monitoring of outcomes and goals and for immediate intervention to help rectify any gaps in performance that may occur.

The Impact of the COVID-19 pandemic continued throughout this reporting period with phased-in reopening and some companies continuing with a remote/hybrid work schedule. The ability for CD staff to conduct in-person monitoring and inspection was still limited. Where possible, CD staff conducted in-person monitoring and inspections. Public works and infrastructure projects are monitored during construction to ensure project progress and final completion, including on-site employee interviews during construction. Staff work with sub-recipients and sub-grantees on reporting fiscal and programmatic data simultaneously to achieve timely reimbursements. Claim vouchers for public service and ESG funded programs are submitted quarterly (monthly vouchering is available upon request) with progress reports and statistical data of services performed and beneficiaries served by income, age, residence in our program area, ethnic background, and other data. Back-up documentation, which must

accompany the claim vouchers are project and program specific, but generally include invoices for project materials purchased, personnel records for labor involved, a detailed scope of services performed, and other data needed to evidence project costs.

### **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.**

Monroe County's Citizen Participation Plan allows residents, steering committee members, and interested parties to provide comments on the Annual Action Plan, the Five-Year Strategic Plan, as well as the Consolidated Annual Performance Evaluation Report (CAPER). Public notices were also published for the Request for Release of Funds, which includes any projects that would trigger an environmental assessment.

Monroe County residents, steering committee members, and interested parties have an opportunity to comment on the Consolidated Annual Performance and Evaluation Report (CAPER) during the 15-day public comment period from Oct 7-Oct 24, 2021. Notices were published in the Daily Record and the Messenger Post newspapers. In addition, the draft CAPER was posted on the Community Development page of the Monroe County website <http://www2.monroecounty.gov/planning-community.php>.

No comments were received during the 15 day public comment period.

## **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.**

Monroe County added a solar component to the Home Improvement Program (HIP) in 2017, utilizing CDBG funds to make available an option for homeowners interested in an alternative to reducing their utility bills. This is an extension of the existing HIP program who have had work completed through the program. Buffalo Solar Solutions assists homeowners to obtain NYSERDA grants and other tax incentives for their solar array. During the program year, six (6) projects were completed with rooftop solar panels with two (2) additional projects approved and currently pending an installation date. In addition to the solar initiative, Monroe County added the acquisition rehab resale program in 2018 under Home Investment Partnership Program (HOME) for the suburban towns and villages throughout Monroe County in partnership with the Rochester Housing Development Fund Corporation (RHDFC), which is a Community Housing Development Organization (CHDO). Three (3) properties were acquired, rehabbed and sold to first time homebuyers. Only two (2) projects have been invoiced/voucherer and are reflected in IDIS. The last project will be reflected in IDIS in the next program year.

Community Development staff also administered Community Development Block Grant – COVID-19 (CDBG-CV) funds from the U.S. Department of Housing and Urban Development. These funds were used to support the community effort to ***“Prepare, Prevent and Respond to”*** the coronavirus including a food and medicine delivery service for seniors, vaccine clinics, quarantine rooms in a congregate shelter, providing direct rental assistance to tenants in Suburban Monroe County, and an economic development loan/grant program for small businesses.

**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.

For the 2020-21 program year, with Monroe County slowly reopening after NY on PAUSE and the community continuing to social distance, staff have monitored and inspected, on-site ten (10) rental housing projects. Staff reviewed tenant files for compliance, including income determinations, re-certifications, and inspected 20% of the HOME units for physical property standards to ensure they are kept maintained. Staff also conducted desk reviews of eight (8) rental housing projects. An additional four (4) desk reviews were attempted but unsuccessful. These four (4) will be placed in the next program year's rental housing portfolio with the anticipation of an on-site review and property inspection as COVID restrictions are being lifted.

A summary of issues that were detected include missing Violence Against Women Act signed forms in some files. Miscalculated budget analyses and other unsigned forms. Physical conditions include loose outlets, leaky faucets, and worn flooring, which were addressed with the respective property managers and immediately corrected with completed work orders shared with CD staff.

Additional information on project specific review is attached in the monitoring report at the end of the CAPER.

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

Monroe County implements its HOME program consistent with all statutory requirements pertaining to affirmative marketing, discrimination, and equal opportunity, which are contained in 24 CFR Part 92 of the HOME Program regulations. County funded affordable development projects require an affirmative marketing plan. Affordable rental housing projects market vacant units to appropriate public housing agencies and the Housing Council at PathStone. This year, Monroe County partnered with Pathstone Corporation, the Housing Council at PathStone, the Monroe County Department of Human Services, the Office of the Aging to conduct a more robust marketing and promotion of Skyview Senior Apartments during its pre-lease up process. During this process, The Housing Council conducted community outreach with area churches, attended community events, and hosted meetings with community stakeholders to conduct more inclusive community outreach and marketing to those least likely to apply for suburban affordable housing. Through these efforts we were able to increase minority participation. Pathstone also advertised using alternate outlets including social media, email blasts to



community organizations, fair housing groups, and housing and family counseling agencies to promote this project as well as other available units for rent.

General contractors associated with the development of affordable rental housing handle outreach to minority- and women- owned businesses when soliciting for subcontractors. The results of these efforts are reflected in the Contractor and Subcontractor Activity Report (HUD 2516) form submitted annually.

**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**

Monroe County receipted \$234,116 of program income during the 2020-21 program year. To date, \$68,928 was expended during the program year on four (4) HIP projects. The homeowners are White, non-Hispanic. Of the four HIP projects, one (1) homeowner was between the 31-50% of AMI, three (3) homeowners were within the 51%-60% AMI. Two (2) of the four homeowners were female head of households. Additional program income was spent on the development of affordable rental housing project and on Administration costs.

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

Monroe County provided HOME funding for the development of affordable rental housing, the acquisition rehab resale program to make available additional single family residential properties for sale to income eligible first time homebuyers, and the Home Improvement Program projects to maintain property value and stabilize the community. The Home Improvement program I made available to income eligible residents throughout the 19 towns and 10 villages within Monroe County. In addition, HOME funds were provided to income eligible first-time homebuyers with direct subsidies for closing costs and/or down payment assistance. Community Development staff continue to evaluate our HOME program and look into new opportunities that will allow us to expand our HOME programs to commit and expend our HOME funds in a more timely manner including partnerships with private agencies and organizations.

**CR-60 - ESG 91.520(g) (ESG Recipients only)**

**ESG Supplement to the CAPER in *e-snaps***

**For Paperwork Reduction Act**

## 1. Recipient Information—All Recipients Complete

### Basic Grant Information

|   |  |
|---|--|
| Recipient Name  | MONROE COUNTY                                  |
| Organizational DUNS Number  | 079678249                                      |
| EIN/TIN Number  | 166002563                                      |
| Identify the Field Office   | BUFFALO  |
| Identify CoC(s) in which the recipient or subrecipient(s) will provide ESG assistance | Rochester/Irondequoit/Greece/Monroe County CoC |

### ESG Contact Name

|             |                               |
|-------------|-------------------------------|
| Prefix      | Ms                            |
| First Name  | Chanh                         |
| Middle Name | 0                             |
| Last Name   | Quach                         |
| Suffix      | 0                             |
| Title       | Community Development Manager |

### ESG Contact Address

|                  |                                  |
|------------------|----------------------------------|
| Street Address 1 | 1150 CityPlace, 50 West Main St. |
| Street Address 2 | 0                                |
| City             | Rochester                        |
| State            | NY                               |
| ZIP Code         | -                                |
| Phone Number     | 5857532021                       |
| Extension        | 0                                |
| Fax Number       | 0                                |
| Email Address    | cquach@monroecounty.gov          |

### ESG Secondary Contact

|               |  |
|---------------|--|
| Prefix        |  |
| First Name    |  |
| Last Name     |  |
| Suffix        |  |
| Title         |  |
| Phone Number  |  |
| Extension     |  |
| Email Address |  |

## 2. Reporting Period—All Recipients Complete

|                         |            |
|-------------------------|------------|
| Program Year Start Date | 08/01/2020 |
| Program Year End Date   | 07/31/2021 |

**3a. Subrecipient Form – Complete one form for each subrecipient**

**Subrecipient or Contractor Name:** CATHOLIC FAMILY CENTER  
**City:** CATHOLIC FAMILY CENTER  
**State:** NY  
**Zip Code:** 99999,  
**DUNS Number:**  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** 15000

**Subrecipient or Contractor Name:** COORDINATED CARE SERVICES, INC.  
**City:** Rochester  
**State:** NY  
**Zip Code:** 14611, 1153  
**DUNS Number:** 151624996  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** 45852

**Subrecipient or Contractor Name:** THE CENTER FOR YOUTH  
**City:** Rochester  
**State:** NY  
**Zip Code:** 14620, 1707  
**DUNS Number:** 085991974  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** 30000

**Subrecipient or Contractor Name:** Hope Ministry  
**City:** Webster  
**State:** NY  
**Zip Code:** 14580, 3619  
**DUNS Number:** 039553300  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Other Non-Profit Organization  
**ESG Subgrant or Contract Award Amount:** 25000

**Subrecipient or Contractor Name:** Person Centered Housing Options

**City:** Rochester

**State:** NY

**Zip Code:** ,

**DUNS Number:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** 33500

## CR-65 - Persons Assisted

### 4. Persons Served

#### 4a. Complete for Homelessness Prevention Activities

| Number of Persons in Households | Total        |
|---------------------------------|--------------|
| Adults                          | 2,662        |
| Children                        | 304          |
| Don't Know/Refused/Other        | 0            |
| Missing Information             | 0            |
| <b>Total</b>                    | <b>2,966</b> |

Table 16 – Household Information for Homeless Prevention Activities

#### 4b. Complete for Rapid Re-Housing Activities

| Number of Persons in Households | Total        |
|---------------------------------|--------------|
| Adults                          | 2,455        |
| Children                        | 144          |
| Don't Know/Refused/Other        | 0            |
| Missing Information             | 0            |
| <b>Total</b>                    | <b>2,599</b> |

Table 17 – Household Information for Rapid Re-Housing Activities

#### 4c. Complete for Shelter

| Number of Persons in Households | Total     |
|---------------------------------|-----------|
| Adults                          | 38        |
| Children                        | 0         |
| Don't Know/Refused/Other        | 0         |
| Missing Information             | 0         |
| <b>Total</b>                    | <b>38</b> |

Table 18 – Shelter Information



#### 4d. Street Outreach

| Number of Persons in Households | Total        |
|---------------------------------|--------------|
| Adults                          | 2,252        |
| Children                        | 1            |
| Don't Know/Refused/Other        | 0            |
| Missing Information             | 0            |
| <b>Total</b>                    | <b>2,253</b> |

Table 19 – Household Information for Street Outreach

#### 4e. Totals for all Persons Served with ESG

| Number of Persons in Households | Total        |
|---------------------------------|--------------|
| Adults                          | 2,662        |
| Children                        | 304          |
| Don't Know/Refused/Other        | 0            |
| Missing Information             | 0            |
| <b>Total</b>                    | <b>2,966</b> |

Table 20 – Household Information for Persons Served with ESG

#### 5. Gender—Complete for All Activities

|                          | Total        |
|--------------------------|--------------|
| Male                     | 1,362        |
| Female                   | 1,285        |
| Transgender              | 15           |
| Don't Know/Refused/Other | 0            |
| Missing Information      | 0            |
| <b>Total</b>             | <b>2,662</b> |

Table 21 – Gender Information

## 6. Age—Complete for All Activities

|                          | <b>Total</b> |
|--------------------------|--------------|
| Under 18                 | 304          |
| 18-24                    | 420          |
| 25 and over              | 2,242        |
| Don't Know/Refused/Other | 0            |
| Missing Information      | 0            |
| <b>Total</b>             | <b>2,966</b> |

Table 22 – Age Information

## 7. Special Populations Served—Complete for All Activities

### Number of Persons in Households

| <b>Subpopulation</b>              | <b>Total</b> | <b>Total Persons Served – Prevention</b> | <b>Total Persons Served – RRH</b> | <b>Total Persons Served in Emergency Shelters</b> |
|-----------------------------------|--------------|--|-----------------------------------|---|
| Veterans                          | 133          | 0  | 0                                 | 0   |
| Victims of Domestic Violence      | 0            | 0  | 0                                 | 0   |
| Elderly                           | 0            | 0  | 0                                 | 0   |
| HIV/AIDS                          | 14           | 0  | 0                                 | 0   |
| Chronically Homeless              | 515          | 0  | 0                                 | 0   |
| <b>Persons with Disabilities:</b> |              |  |                                   |   |
| Severely Mentally Ill             | 829          | 0  | 0                                 | 0   |
| Chronic Substance Abuse           | 583          | 0  | 0                                 | 0   |
| Other Disability                  | 819          | 0  | 0                                 | 0   |
| Total (Unduplicated if possible)  | 0            | 0  | 0                                 | 0   |

Table 23 – Special Population Served



## CR-70 – ESG 91.520(g) - Assistance Provided and Outcomes

### 10. Shelter Utilization

|                                      |       |
|--------------------------------------|-------|
| Number of New Units - Rehabbed       | 0     |
| Number of New Units - Conversion     | 0     |
| Total Number of bed-nights available | 0     |
| Total Number of bed-nights provided  | 38    |
| Capacity Utilization                 | 0.00% |

Table 24 – Shelter Capacity

### 11. Project Outcomes Data measured under the performance standards developed in consultation with the CoC(s)

## CR-75 – Expenditures

### 11. Expenditures

#### 11a. ESG Expenditures for Homelessness Prevention

|   | Dollar Amount of Expenditures in Program Year |               |               |
|---|---|---------------|---------------|
|   | 2018  | 2019          | 2020          |
| Expenditures for Rental Assistance  | 26,212  | 30,697        | 26,527        |
| Expenditures for Housing Relocation and Stabilization Services - Financial Assistance | 0   | 0             | 0             |
| Expenditures for Housing Relocation & Stabilization Services - Services               | 0   | 14,215        | 0             |
| Expenditures for Homeless Prevention under Emergency Shelter Grants Program           | 0   | 0             | 0             |
| <b>Subtotal Homelessness Prevention</b>   | <b>26,212</b>                                 | <b>44,912</b> | <b>26,527</b> |

Table 25 – ESG Expenditures for Homelessness Prevention

#### 11b. ESG Expenditures for Rapid Re-Housing

|   | Dollar Amount of Expenditures in Program Year |               |          |
|---|---|---------------|----------|
|   | 2018  | 2019          | 2020     |
| Expenditures for Rental Assistance  | 577   | 903           | 0        |
| Expenditures for Housing Relocation and Stabilization Services - Financial Assistance | 2,098   | 0             | 0        |
| Expenditures for Housing Relocation & Stabilization Services - Services               | 11,414  | 42,098        | 0        |
| Expenditures for Homeless Assistance under Emergency Shelter Grants Program           | 0   | 0             | 0        |
| <b>Subtotal Rapid Re-Housing</b>  | <b>14,089</b>                                 | <b>43,001</b> | <b>0</b> |

Table 26 – ESG Expenditures for Rapid Re-Housing

#### 11c. ESG Expenditures for Emergency Shelter

|                    | Dollar Amount of Expenditures in Program Year |        |        |
|--------------------|---|--------|--------|
|                    | 2018  | 2019   | 2020   |
| Essential Services | 0   | 0      | 0      |
| Operations         | 0   | 25,481 | 19,570 |
| Renovation         | 0   | 0      | 0      |

|                 |          |               |               |
|-----------------|----------|---------------|---------------|
| Major Rehab     | 0        | 0             | 0             |
| Conversion      | 0        | 0             | 0             |
| <b>Subtotal</b> | <b>0</b> | <b>25,481</b> | <b>19,570</b> |

**Table 27 – ESG Expenditures for Emergency Shelter**

**11d. Other Grant Expenditures**

|                 | Dollar Amount of Expenditures in Program Year |        |        |
|-----------------|---|--------|--------|
|                 | 2018  | 2019   | 2020   |
| Street Outreach | 22,530  | 6,789  | 27,630 |
| HMIS            | 0   | 0      | 0      |
| Administration  | 11,160  | 11,486 | 12,109 |

**Table 28 - Other Grant Expenditures**

**11e. Total ESG Grant Funds**

| Total ESG Funds Expended | 2018   | 2019    | 2020   |
|--------------------------|--------|---------|--------|
|                          | 73,991 | 131,669 | 85,836 |

**Table 29 - Total ESG Funds Expended**

**11f. Match Source**

|                         | 2018   | 2019   | 2020   |
|-------------------------|--------|--------|--------|
| Other Non-ESG HUD Funds | 27,485 | 0      | 31,684 |
| Other Federal Funds     | 0      | 0      | 0      |
| State Government        | 0      | 51,097 | 0      |
| Local Government        | 0      | 0      | 0      |

|                           |                |                |                |
|---------------------------|----------------|----------------|----------------|
| Private Funds             | 9,704          | 18,200         | 35,519         |
| Other                     | 99,733         | 62,372         | 95,582         |
| Fees                      | 0              | 0              | 0              |
| Program Income            | 0              | 0              | 0              |
| <b>Total Match Amount</b> | <b>136,922</b> | <b>131,669</b> | <b>162,785</b> |

**Table 30 - Other Funds Expended on Eligible ESG Activities**

**11g. Total**

| <b>Total Amount of Funds Expended on ESG Activities</b> | <b>2018</b> | <b>2019</b> | <b>2020</b> |
|---|-------------|-------------|-------------|
|   | 210,913     | 263,338     | 248,621     |

**Table 31 - Total Amount of Funds Expended on ESG Activities**

# Attachment

## ESG SAGE Report 2020



**HUD ESG CAPER**

Grant: **ESG: Monroe County - NY - Report** Type: CAPER

**Report Date Range**

8/1/2020 to 7/31/2021

**Contact Information**

First Name   
 Middle Name   
 Last Name   
 Suffix   
 Title   
 Street Address 1   
 Street Address 2   
 City   
 State   
 ZIP Code   
 E-mail Address   
 Phone Number   
 Extension   
 Fax Number

**Project types carried out during the program year**

| Components                               | Projects | Total Persons Reported | Total Households Reported |
|--|----------|------------------------|---------------------------|
| Emergency Shelter                        | 1        | 93                     | 90                        |
| Day Shelter                              | 0        | 0                      | 0                         |
| Transitional Housing                     | 0        | 0                      | 0                         |
| <b>Total Emergency Shelter Component</b> | <b>1</b> | <b>93</b>              | <b>90</b>                 |
| Total Street Outreach                    | 2        | 1680                   | 1677                      |
| Total PH - Rapid Re-Housing              | 1        | 309                    | 161                       |
| Total Homelessness Prevention            | 2        | 226                    | 98                        |

**Grant Information**

**Emergency Shelter Rehab/Conversion**

Did you create additional shelter beds/units through an ESG-funded rehab project   
 Did you create additional shelter beds/units through an ESG-funded conversion project

**Data Participation Information**

**HMIS**

Are 100% of the project(s) funded through ESG, which are allowed to use HMIS, entering data into HMIS?   
 Have all of the projects entered data into Sage via a CSV - CAPER Report upload?

**Comparable Database**

Are 100% of the project(s) funded through ESG, which are allowed to use a comparable database, entering data into the comparable database?   
 Have all of the projects entered data into Sage via a CSV - CAPER Report upload?

**Project Outcomes**

- no data -

**Financial Information**

**ESG information from IDIS**

As of 10/22/2021

| FY           | Grant Number | Current Authorized Amount | Funds Committed By Recipient | Funds Drawn           | Balance Remaining  | Obligation Date | Expenditure Deadline |
|--------------|--------------|---------------------------|------------------------------|-----------------------|--------------------|-----------------|----------------------|
| 2020         | E20UC360002  | \$161,462.00              | \$161,462.00                 | \$141,925.90          | \$19,536.10        | 7/22/2020       | 7/22/2022            |
| 2019         | E19UC360002  | \$153,145.00              | \$153,145.00                 | \$153,145.00          | \$0                | 7/31/2019       | 7/31/2021            |
| 2018         | E18UC360002  | \$148,799.00              | \$148,799.00                 | \$148,799.00          | \$0                | 8/22/2018       | 8/22/2020            |
| 2017         | E17UC360002  | \$148,669.00              | \$148,669.00                 | \$148,669.00          | \$0                | 9/12/2017       | 9/12/2019            |
| 2016         | E16UC360002  | \$149,729.75              | \$149,729.75                 | \$149,729.75          | \$0                | 8/22/2016       | 8/22/2018            |
| 2015         | E15UC360002  | \$147,425.00              | \$147,425.00                 | \$147,425.00          | \$0                | 8/20/2015       | 8/20/2017            |
| <b>Total</b> |              | <b>\$1,160,031.75</b>     | <b>\$1,160,031.75</b>        | <b>\$1,140,495.65</b> | <b>\$19,536.10</b> |                 |                      |

**Expenditures**

2020 No 2019 No 2018 No 2017 No 2016 No 2015 No

**Homelessness Prevention**

- Rental Assistance
- Relocation and Stabilization Services - Financial Assistance
- Relocation and Stabilization Services - Services
- Hazard Pay (unique activity)
- Landlord Incentives (unique activity)
- Volunteer Incentives (unique activity)
- Training (unique activity)

**Homeless Prevention Expenses**

**Rapid Re-Housing**

- Rental Assistance
- Relocation and Stabilization Services - Financial Assistance
- Relocation and Stabilization Services - Services
- Hazard Pay (unique activity)
- Landlord Incentives (unique activity)
- Volunteer Incentives (unique activity)
- Training (unique activity)

**RRH Expenses**

**Emergency Shelter**

- Essential Services
- Operations
- Renovation
- Major Rehab
- Conversion
- Hazard Pay (unique activity)
- Volunteer Incentives (unique activity)
- Training (unique activity)

**Emergency Shelter Expenses**

**Temporary Emergency Shelter**

- Essential Services
- Operations
- Leasing existing real property or temporary structures
- Acquisition
- Renovation
- Hazard Pay (unique activity)
- Volunteer Incentives (unique activity)
- Training (unique activity)
- Other Shelter Costs

**Temporary Emergency Shelter Expenses**

**Street Outreach**

- Essential Services
- Hazard Pay (unique activity)
- Volunteer Incentives (unique activity)
- Training (unique activity)
- Handwashing Stations/Portable Bathrooms (unique activity)

**Street Outreach Expenses**

**Other ESG Expenditures**

- Training (unique activity)
- HMIS
- Administration

**Other Expenses**

**Total Expenditures**

Match

**Total ESG expenditures plus match**

**Total expenditures plus match for all years**

0.00







CAPER Aggregator

Uses data only from CAPER's submitted to HUD. Aggregates data from multiple CAPER's by selected criteria (project type and/or specific question).

If you attempt to pull an entire CAPER, especially aggregating over many ESGs, you may have to wait several minutes for the result. If you receive a server error after waiting several minutes, you should reduce the number of questions and try again.

**ⓘ Data entered in Sage today will be added to the Aggregator overnight.**

"Year" means the year of the start date for the submission.

Report criteria

Year

Recipient - ESG Grant  
(1 selected)

Selected: ESG: Monroe County - NY

*TIP: Hold down the CTRL key on the keyboard and click with the mouse in order to select more than one Recipient - ESG Grant.*

CAPER Project Type

*TIP: Hold down the CTRL key on the keyboard and click with the mouse in order to select more than one choice.*

Grant List

| Jurisdiction            | Type  | Start Date | End Date  |
|-------------------------|-------|------------|-----------|
| ESG: Monroe County - NY | CAPER | 8/1/2020   | 7/31/2021 |

Q05a: Report Validations Table

|   |      |
|---|------|
| Total Number of Persons Served  | 2308 |
| Number of Adults (Age 18 or Over)                                     | 1979 |
| Number of Children (Under Age 18)                                     | 325  |
| Number of Persons with Unknown Age                                    | 4    |
| Number of Leavers   | 2008 |
| Number of Adult Leavers   | 1748 |
| Number of Adult and Head of Household Leavers                         | 1836 |
| Number of Stayers   | 300  |
| Number of Adult Stayers   | 231  |
| Number of Veterans  | 114  |
| Number of Chronically Homeless Persons                                | 380  |
| Number of Youth Under Age 25  | 388  |
| Number of Parenting Youth Under Age 25 with Children                  | 13   |
| Number of Adult Heads of Household                                    | 1936 |
| Number of Child and Unknown-Age Heads of Household                    | 90   |
| Heads of Households and Adult Stayers in the Project 365 Days or More | 19   |

**Q06a: Data Quality: Personally Identifying Information (PII)**

|                        | Client Doesn't Know/Refused | Information Missing | Data Issues | Total | % of Error Rate |
|------------------------|-----------------------------|---------------------|-------------|-------|-----------------|
| Name                   | 0                           | 0                   | 0           | 0     | 0.00 %          |
| Social Security Number | 101                         | 0                   | 9           | 110   | 4.77 %          |
| Date of Birth          | 0                           | 4                   | 0           | 4     | 0.17 %          |
| Race                   | 0                           | 3                   | 0           | 3     | 0.13 %          |
| Ethnicity              | 0                           | 3                   | 0           | 3     | 0.13 %          |
| Gender                 | 0                           | 4                   | 0           | 4     | 0.17 %          |
| Overall Score          |                             |                     |             | 110   | 4.77 %          |

**Q06b: Data Quality: Universal Data Elements**

|                                   | Error Count | % of Error Rate |
|-----------------------------------|-------------|-----------------|
| Veteran Status                    | 0           | 0.00 %          |
| Project Start Date                | 0           | 0.00 %          |
| Relationship to Head of Household | 3           | 0.13 %          |
| Client Location                   | 1           | 0.05 %          |
| Disabling Condition               | 5           | 0.22 %          |

**Q06c: Data Quality: Income and Housing Data Quality**

|   | Error Count | % of Error Rate |
|---|-------------|-----------------|
| Destination                             | 18          | 0.90 %          |
| Income and Sources at Start             | 4           | 0.20 %          |
| Income and Sources at Annual Assessment | 0           | 0.00 %          |
| Income and Sources at Exit              | 1           | 0.05 %          |

**Q06d: Data Quality: Chronic Homelessness**

|                         | Count of Total Records | Missing Time in Institution | Missing Time in Housing | Approximate Date Started DK/R/missing | Number of Times DK/R/missing | Number of Months DK/R/missing | % of Records Unable to Calculate |
|-------------------------|------------------------|-----------------------------|-------------------------|---------------------------------------|------------------------------|-------------------------------|----------------------------------|
| ES, SH, Street Outreach | 156                    | 0                           | 0                       | 3                                     | 1                            | 1                             | 0.02                             |
| TH                      | 0                      | 0                           | 0                       | 0                                     | 0                            | 0                             | -                                |
| PH (All)                | 169                    | 0                           | 0                       | 0                                     | 0                            | 0                             | 0.00                             |
| Total                   | 325                    | 0                           | 0                       | 0                                     | 0                            | 0                             | 0.01                             |

**Q06e: Data Quality: Timeliness**

|           | Number of Project Start Records | Number of Project Exit Records |
|-----------|---------------------------------|--------------------------------|
| 0 days    | 116                             | 133                            |
| 1-3 Days  | 121                             | 96                             |
| 4-6 Days  | 58                              | 38                             |
| 7-10 Days | 47                              | 30                             |
| 11+ Days  | 191                             | 244                            |

**Q06f: Data Quality: Inactive Records: Street Outreach & Emergency Shelter**

|  | # of Records | # of Inactive Records | % of Inactive Records |
|--|--------------|-----------------------|-----------------------|
| Contact (Adults and Heads of Household in Street Outreach or ES - NBN) | 23           | 10                    | 43.48 %               |
| Bed Night (All Clients in ES - NBN)                                    | 0            | 0                     | -                     |

**Q07a: Number of Persons Served**

|   | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------------|------------------|--------------------------|--------------------|------------------------|
| Adults  | 1979        | 1847             | 132                      | 0                  | 0                      |
| Children  | 325         | 0                | 236                      | 89                 | 0                      |
| Client Doesn't Know/ Client Refused                             | 0           | 0                | 0                        | 0                  | 0                      |
| Data Not Collected  | 4           | 0                | 0                        | 0                  | 4                      |
| <b>Total</b>  | <b>2308</b> | <b>1847</b>      | <b>368</b>               | <b>89</b>          | <b>4</b>               |
| For PSH & RRH – the total persons served who moved into housing | 194         | 51               | 143                      | 0                  | 0                      |

**Q08a: Households Served**

|  | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|--|-------|------------------|--------------------------|--------------------|------------------------|
| Total Households   | 2026  | 1823             | 113                      | 89                 | 1                      |
| For PSH & RRH – the total households served who moved into housing | 92    | 48               | 44                       | 0                  | 0                      |

**Q08b: Point-in-Time Count of Households on the Last Wednesday**

|         | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---------|-------|------------------|--------------------------|--------------------|------------------------|
| January | 140   | 112              | 27                       | 1                  | 0                      |
| April   | 173   | 141              | 27                       | 5                  | 0                      |
| July    | 217   | 192              | 24                       | 1                  | 0                      |
| October | 207   | 170              | 33                       | 4                  | 0                      |

**Q09a: Number of Persons Contacted**

|                                | All Persons Contacted | First contact – NOT staying on the Streets, ES, or SH | First contact – WAS staying on Streets, ES, or SH | First contact – Worker unable to determine |
|--------------------------------|-----------------------|---|---|--|
| Once                           | 51                    | 0   | 31  | 0  |
| 2-5 Times                      | 2                     | 0   | 2   | 0  |
| 6-9 Times                      | 0                     | 0   | 0   | 0  |
| 10+ Times                      | 2                     | 0   | 2   | 0  |
| <b>Total Persons Contacted</b> | <b>55</b>             | <b>0</b>  | <b>35</b>   | <b>0</b>                                   |

**Q09b: Number of Persons Engaged**

|                              | All Persons Contacted | First contact – NOT staying on the Streets, ES, or SH | First contact – WAS staying on Streets, ES, or SH | First contact – Worker unable to determine |
|------------------------------|-----------------------|---|---|--|
| Once                         | 37                    | 0   | 22  | 0  |
| 2-5 Contacts                 | 1                     | 0   | 1   | 0  |
| 6-9 Contacts                 | 0                     | 0   | 0   | 0  |
| 10+ Contacts                 | 0                     | 0   | 0   | 0  |
| <b>Total Persons Engaged</b> | <b>38</b>             | <b>0</b>  | <b>23</b>   | <b>0</b>                                   |
| Rate of Engagement           | 1                     | 0   | 1   | 0  |

**Q10a: Gender of Adults**

|  | Total       | Without Children | With Children and Adults | Unknown Household Type |
|--|-------------|------------------|--------------------------|------------------------|
| Male                                   | 1050        | 1030             | 20                       | 0                      |
| Female                                 | 918         | 806              | 112                      | 0                      |
| No Single Gender                       | 2           | 2                | 0                        | 0                      |
| Questioning                            | 0           | 0                | 0                        | 0                      |
| Transgender                            | 9           | 9                | 0                        | 0                      |
| Client Doesn't Know/Client Refused     | 0           | 0                | 0                        | 0                      |
| Data Not Collected                     | 0           | 0                | 0                        | 0                      |
| <b>Total</b>                           | <b>1979</b> | <b>1847</b>      | <b>132</b>               | <b>0</b>               |
| Trans Female (MTF or Male to Female) ☺ | -           | -                | -                        | -                      |
| Trans Male (FTM or Female to Male) ☺   | -           | -                | -                        | -                      |

**Q10b: Gender of Children**

|                                      | Total      | With Children and Adults | With Only Children | Unknown Household Type |
|--------------------------------------|------------|--------------------------|--------------------|------------------------|
| Male                                 | 144        | 117                      | 27                 | 0                      |
| Female                               | 179        | 119                      | 60                 | 0                      |
| No Single Gender                     | 1          | 0                        | 1                  | 0                      |
| Questioning                          | 0          | 0                        | 0                  | 0                      |
| Transgender                          | 1          | 0                        | 1                  | 0                      |
| Client Doesn't Know/Client Refused   | 0          | 0                        | 0                  | 0                      |
| Data Not Collected                   | 0          | 0                        | 0                  | 0                      |
| <b>Total</b>                         | <b>325</b> | <b>236</b>               | <b>89</b>          | <b>0</b>               |
| Trans Female (MTF or Male to Female) | -          | -                        | -                  | -                      |
| Trans Male (FTM or Female to Male)   | -          | -                        | -                  | -                      |

**Q10c: Gender of Persons Missing Age Information**

|  | Total    | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|--|----------|------------------|--------------------------|--------------------|------------------------|
| Male                                   | 0        | 0                | 0                        | 0                  | 0                      |
| Female                                 | 0        | 0                | 0                        | 0                  | 0                      |
| No Single Gender                       | 0        | 0                | 0                        | 0                  | 0                      |
| Questioning                            | 0        | 0                | 0                        | 0                  | 0                      |
| Transgender                            | 0        | 0                | 0                        | 0                  | 0                      |
| Client Doesn't Know/Client Refused     | 0        | 0                | 0                        | 0                  | 0                      |
| Data Not Collected                     | 4        | 0                | 0                        | 0                  | 4                      |
| <b>Total</b>                           | <b>4</b> | <b>0</b>         | <b>0</b>                 | <b>0</b>           | <b>4</b>               |
| Trans Female (MTF or Male to Female) ☺ | -        | -                | -                        | -                  | -                      |
| Trans Male (FTM or Female to Male) ☺   | -        | -                | -                        | -                  | -                      |

**Q10d: Gender by Age Ranges**

|  | Total       | Under Age 18 | Age 18-24  | Age 25-61   | Age 62 and over | Client Doesn't Know/ Client Refused | Data Not Collected |
|--|-------------|--------------|------------|-------------|-----------------|-------------------------------------|--------------------|
| Male                                   | 1194        | 144          | 116        | 846         | 88              | 0                                   | 0                  |
| Female                                 | 1097        | 179          | 195        | 695         | 28              | 0                                   | 0                  |
| No Single Gender                       | 3           | 1            | 2          | 0           | 0               | 0                                   | 0                  |
| Questioning                            | 0           | 0            |            | 0           | 0               | 0                                   | 0                  |
| Transgender                            | 10          | 1            | 3          | 6           | 0               | 0                                   | 0                  |
| Client Doesn't Know/Client Refused     | 0           | 0            | 0          | 0           | 0               | 0                                   | 0                  |
| Data Not Collected                     | 4           | 0            | 0          | 0           | 0               | 0                                   | 4                  |
| <b>Total</b>                           | <b>2308</b> | <b>325</b>   | <b>316</b> | <b>1547</b> | <b>116</b>      | <b>0</b>                            | <b>4</b>           |
| Trans Female (MTF or Male to Female) ☺ | -           | -            | -          | -           | -               | -                                   | -                  |
| Trans Male (FTM or Female to Male) ☺   | -           | -            | -          | -           | -               | -                                   | -                  |

**Q11: Age**

|                                    | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|------------------------------------|-------------|------------------|--------------------------|--------------------|------------------------|
| Under 5                            | 75          | 0                | 75                       | 0                  | 0                      |
| 5 - 12                             | 129         | 0                | 124                      | 5                  | 0                      |
| 13 - 17                            | 121         | 0                | 37                       | 84                 | 0                      |
| 18 - 24                            | 316         | 295              | 21                       | 0                  | 0                      |
| 25 - 34                            | 542         | 475              | 67                       | 0                  | 0                      |
| 35 - 44                            | 418         | 389              | 29                       | 0                  | 0                      |
| 45 - 54                            | 357         | 346              | 11                       | 0                  | 0                      |
| 55 - 61                            | 230         | 227              | 3                        | 0                  | 0                      |
| 62+                                | 116         | 115              | 1                        | 0                  | 0                      |
| Client Doesn't Know/Client Refused | 0           | 0                | 0                        | 0                  | 0                      |
| Data Not Collected                 | 4           | 0                | 0                        | 0                  | 4                      |
| <b>Total</b>                       | <b>2308</b> | <b>1847</b>      | <b>368</b>               | <b>89</b>          | <b>4</b>               |

**Q12a: Race**

|   | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------------|------------------|--------------------------|--------------------|------------------------|
| White   | 835         | 693              | 120                      | 22                 | 0                      |
| Black, African American, or African           | 1336        | 1057             | 222                      | 56                 | 1                      |
| Asian or Asian American                       | 15          | 14               | 0                        | 1                  | 0                      |
| American Indian, Alaska Native, or Indigenous | 20          | 18               | 1                        | 1                  | 0                      |
| Native Hawaiian or Pacific Islander           | 13          | 8                | 4                        | 1                  | 0                      |
| Multiple Races                                | 86          | 57               | 21                       | 8                  | 0                      |
| Client Doesn't Know/Client Refused            | 0           | 0                | 0                        | 0                  | 0                      |
| Data Not Collected                            | 3           | 0                | 0                        | 0                  | 3                      |
| <b>Total</b>                                  | <b>2308</b> | <b>1847</b>      | <b>368</b>               | <b>89</b>          | <b>4</b>               |

**Q12b: Ethnicity**

|                                    | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|------------------------------------|-------------|------------------|--------------------------|--------------------|------------------------|
| Non-Hispanic/Non-Latin(a)(o)(x)    | 1900        | 1542             | 290                      | 67                 | 1                      |
| Hispanic/Latin(a)(o)(x)            | 405         | 305              | 78                       | 22                 | 0                      |
| Client Doesn't Know/Client Refused | 0           | 0                | 0                        | 0                  | 0                      |
| Data Not Collected                 | 3           | 0                | 0                        | 0                  | 3                      |
| <b>Total</b>                       | <b>2308</b> | <b>1847</b>      | <b>368</b>               | <b>89</b>          | <b>4</b>               |

**Q13a1: Physical and Mental Health Conditions at Entry**

|   | Total Persons | Without Children | Adults in HH with Children & Adults | Children in HH with Children & Adults | With Children and Adults ☺ | With Only Children | Unknown Household Type |
|---|---------------|------------------|-------------------------------------|---------------------------------------|----------------------------|--------------------|------------------------|
| Mental Health Disorder                  | 685           | 634              | 22                                  | 4                                     |                            | 25                 | 0                      |
| Alcohol Use Disorder                    | 72            | 71               | 1                                   | 0                                     |                            | 0                  | 0                      |
| Drug Use Disorder                       | 155           | 152              | 1                                   | 0                                     |                            | 2                  | 0                      |
| Both Alcohol Use and Drug Use Disorders | 212           | 210              | 0                                   | 0                                     |                            | 2                  | 0                      |
| Chronic Health Condition                | 199           | 190              | 6                                   | 0                                     |                            | 3                  | 0                      |
| HIV/AIDS                                | 14            | 14               | 0                                   | 0                                     |                            | 0                  | 0                      |
| Developmental Disability                | 105           | 82               | 7                                   | 5                                     |                            | 11                 | 0                      |
| Physical Disability                     | 350           | 332              | 12                                  | 3                                     |                            | 3                  | 0                      |

☺ The "With Children and Adults" column is retired as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

**Q13b1: Physical and Mental Health Conditions at Exit**

|   | Total Persons | Without Children | Adults in HH with Children & Adults | Children in HH with Children & Adults | With Children and Adults ☺ | With Only Children | Unknown Household Type |
|---|---------------|------------------|-------------------------------------|---------------------------------------|----------------------------|--------------------|------------------------|
| Mental Health Disorder                  | 613           | 567              | 17                                  | 3                                     |                            | 26                 | 0                      |
| Alcohol Use Disorder                    | 65            | 65               | 0                                   | 0                                     |                            | 0                  | 0                      |
| Drug Use Disorder                       | 136           | 133              | 1                                   | 0                                     |                            | 2                  | 0                      |
| Both Alcohol Use and Drug Use Disorders | 196           | 194              | 0                                   | 0                                     |                            | 2                  | 0                      |
| Chronic Health Condition                | 175           | 168              | 4                                   | 0                                     |                            | 3                  | 0                      |
| HIV/AIDS                                | 12            | 12               | 0                                   | 0                                     |                            | 0                  | 0                      |
| Developmental Disability                | 94            | 75               | 4                                   | 3                                     |                            | 12                 | 0                      |
| Physical Disability                     | 309           | 296              | 10                                  | 0                                     |                            | 3                  | 0                      |

☺ The "With Children and Adults" column is retired as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

**Q13c1: Physical and Mental Health Conditions for Stayers**

|   | Total Persons | Without Children | Adults in HH with Children & Adults | Children in HH with Children & Adults | With Children and Adults | With Only Children | Unknown Household Type |
|---|---------------|------------------|-------------------------------------|---------------------------------------|--------------------------|--------------------|------------------------|
| Mental Health Disorder                  | 90            | 84               | 5                                   | 1                                     |                          | 0                  | 0                      |
| Alcohol Use Disorder                    | 10            | 9                | 1                                   | 0                                     |                          | 0                  | 0                      |
| Drug Use Disorder                       | 22            | 22               | 0                                   | 0                                     |                          | 0                  | 0                      |
| Both Alcohol Use and Drug Use Disorders | 19            | 19               | 0                                   | 0                                     |                          | 0                  | 0                      |
| Chronic Health Condition                | 31            | 29               | 2                                   | 0                                     |                          | 0                  | 0                      |
| HIV/AIDS                                | 2             | 2                | 0                                   | 0                                     |                          | 0                  | 0                      |
| Developmental Disability                | 16            | 11               | 3                                   | 2                                     |                          | 0                  | 0                      |
| Physical Disability                     | 48            | 43               | 2                                   | 3                                     |                          | 0                  | 0                      |

The "With Children and Adults" column is retired as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

**Q14a: Domestic Violence History**

|                                    | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|------------------------------------|-------|------------------|--------------------------|--------------------|------------------------|
| Yes                                | 490   | 435              | 51                       | 4                  | 0                      |
| No                                 | 1421  | 1261             | 81                       | 78                 | 1                      |
| Client Doesn't Know/Client Refused | 0     | 0                | 0                        | 0                  | 0                      |
| Data Not Collected                 | 158   | 151              | 0                        | 7                  | 0                      |
| Total                              | 2069  | 1847             | 132                      | 89                 | 1                      |

**Q14b: Persons Fleeing Domestic Violence**

|                                    | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|------------------------------------|-------|------------------|--------------------------|--------------------|------------------------|
| Yes                                | 240   | 211              | 28                       | 1                  | 0                      |
| No                                 | 249   | 224              | 23                       | 2                  | 0                      |
| Client Doesn't Know/Client Refused | 0     | 0                | 0                        | 0                  | 0                      |
| Data Not Collected                 | 1     | 0                | 0                        | 1                  | 0                      |
| Total                              | 490   | 435              | 51                       | 4                  | 0                      |

**Q15: Living Situation**

|   | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------------|------------------|--------------------------|--------------------|------------------------|
| Emergency shelter, including hotel or motel paid for with emergency shelter voucher               | 462         | 398              | 62                       | 2                  | 0                      |
| Transitional housing for homeless persons (including homeless youth)                              | 31          | 30               | 0                        | 1                  | 0                      |
| Place not meant for habitation  | 241         | 226              | 5                        | 10                 | 0                      |
| Safe Haven  | 13          | 12               | 0                        | 1                  | 0                      |
| Host Home (non-crisis)  | 0           | 0                | 0                        | 0                  | 0                      |
| Interim Housing  | -           | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | <b>747</b>  | <b>666</b>       | <b>67</b>                | <b>14</b>          | <b>0</b>               |
| Psychiatric hospital or other psychiatric facility  | 39          | 36               | 0                        | 3                  | 0                      |
| Substance abuse treatment facility or detox center  | 30          | 30               | 0                        | 0                  | 0                      |
| Hospital or other residential non-psychiatric medical facility                                    | 50          | 50               | 0                        | 0                  | 0                      |
| Jail, prison or juvenile detention facility   | 216         | 214              | 1                        | 1                  | 0                      |
| Foster care home or foster care group home  | 3           | 1                | 0                        | 2                  | 0                      |
| Long-term care facility or nursing home   | 2           | 2                | 0                        | 0                  | 0                      |
| Residential project or halfway house with no homeless criteria                                    | 12          | 12               | 0                        | 0                  | 0                      |
| <b>Subtotal</b>   | <b>352</b>  | <b>345</b>       | <b>1</b>                 | <b>6</b>           | <b>0</b>               |
| Permanent housing (other than RRH) for formerly homeless persons                                  | 4           | 4                | 0                        | 0                  | 0                      |
| Owned by client, no ongoing housing subsidy   | 2           | 2                | 0                        | 0                  | 0                      |
| Owned by client, with ongoing housing subsidy   | 1           | 0                | 1                        | 0                  | 0                      |
| Rental by client, with RRH or equivalent subsidy  | 1           | 0                | 1                        | 0                  | 0                      |
| Rental by client, with HCV voucher (tenant or project based)                                      | 0           | 0                | 0                        | 0                  | 0                      |
| Rental by client in a public housing unit   | 6           | 6                | 0                        | 0                  | 0                      |
| Rental by client, no ongoing housing subsidy  | 135         | 91               | 44                       | 0                  | 0                      |
| Rental by client, with VASH subsidy   | 2           | 2                | 0                        | 0                  | 0                      |
| Rental by client with GPD TIP subsidy   | 1           | 1                | 0                        | 0                  | 0                      |
| Rental by client, with other housing subsidy  | 24          | 17               | 7                        | 0                  | 0                      |
| Hotel or motel paid for without emergency shelter voucher   | 82          | 82               | 0                        | 0                  | 0                      |
| Staying or living in a friend's room, apartment or house  | 220         | 207              | 4                        | 9                  | 0                      |
| Staying or living in a family member's room, apartment or house                                   | 357         | 290              | 7                        | 60                 | 0                      |
| Client Doesn't Know/Client Refused  | 1           | 1                | 0                        | 0                  | 0                      |
| Data Not Collected  | 134         | 133              | 0                        | 0                  | 1                      |
| <b>Subtotal</b>   | <b>970</b>  | <b>836</b>       | <b>64</b>                | <b>69</b>          | <b>1</b>               |
| <b>Total</b>  | <b>2069</b> | <b>1847</b>      | <b>132</b>               | <b>89</b>          | <b>1</b>               |

 Interim housing is retired as of 10/1/2019.

**Q16: Cash Income - Ranges**

|   | Income at Start | Income at Latest Annual Assessment for Stayers | Income at Exit for Leavers |
|---|-----------------|--|----------------------------|
| No income   | 949             | 1  | 736                        |
| \$1 - \$150   | 27              | 0  | 28                         |
| \$151 - \$250   | 38              | 0  | 31                         |
| \$251 - \$500   | 149             | 1  | 203                        |
| \$501 - \$1000  | 408             | 6  | 375                        |
| \$1,001 - \$1,500   | 104             | 6  | 96                         |
| \$1,501 - \$2,000   | 84              | 1  | 83                         |
| \$2,001+  | 70              | 4  | 76                         |
| Client Doesn't Know/Client Refused                                    | 0               | 0  | 0                          |
| Data Not Collected  | 150             | 0  | 120                        |
| Number of Adult Stayers Not Yet Required to Have an Annual Assessment | 0               | 212  | 0                          |
| Number of Adult Stayers Without Required Annual Assessment            | 0               | 0  | 0                          |
| <b>Total Adults</b>   | <b>1979</b>     | <b>231</b>                                     | <b>1748</b>                |

**Q17: Cash Income - Sources**

|  | Income at Start | Income at Latest Annual Assessment for Stayers | Income at Exit for Leavers |
|--|-----------------|--|----------------------------|
| Earned Income  | 169             | 6  | 165                        |
| Unemployment Insurance   | 129             | 5  | 131                        |
| SSI  | 288             | 1  | 268                        |
| SSDI   | 139             | 2  | 125                        |
| VA Service-Connected Disability Compensation                       | 10              | 0  | 10                         |
| VA Non-Service Connected Disability Pension                        | 7               | 0  | 6                          |
| Private Disability Insurance                                       | 1               | 0  | 1                          |
| Worker's Compensation  | 1               | 0  | 1                          |
| TANF or Equivalent   | 96              | 4  | 88                         |
| General Assistance   | 115             | 1  | 187                        |
| Retirement (Social Security)                                       | 14              | 0  | 13                         |
| Pension from Former Job  | 12              | 0  | 8                          |
| Child Support  | 45              | 0  | 39                         |
| Alimony (Spousal Support)  | 3               | 0  | 3                          |
| Other Source   | 12              | 0  | 12                         |
| Adults with Income Information at Start and Annual Assessment/Exit | 0               | 19   | 2                          |

**Q19b: Disabling Conditions and Income for Adults at Exit**

|  | AO: Adult with Disabling Condition | AO: Adult without Disabling Condition | AO: Total Adults | AO: % with Disabling Condition by Source | AC: Adult with Disabling Condition | AC: Adult without Disabling Condition | AC: Total Adults | AC: % with Disabling Condition by Source | UK: Adult with Disabling Condition | UK: Adult without Disabling Condition | UK: Total Adults | UK: % with Disabling Condition by Source |
|--|------------------------------------|---------------------------------------|------------------|--|------------------------------------|---------------------------------------|------------------|--|------------------------------------|---------------------------------------|------------------|--|
| Earned Income                                  | 32                                 | 90                                    | 122              | 0.26                                     | 2                                  | 38                                    | 40               | 0.05                                     | 0                                  | 0                                     | 0                | --                                       |
| Supplemental Security Income (SSI)             | 199                                | 45                                    | 244              | 0.82                                     | 7                                  | 7                                     | 14               | 0.50                                     | 0                                  | 0                                     | 0                | --                                       |
| Social Security Disability Insurance (SSDI)    | 105                                | 9                                     | 114              | 0.92                                     | 1                                  | 1                                     | 2                | 0.50                                     | 0                                  | 0                                     | 0                | --                                       |
| VA Service-Connected Disability Compensation   | 7                                  | 1                                     | 8                | 0.88                                     | 0                                  | 0                                     | 0                | --                                       | 0                                  | 0                                     | 0                | --                                       |
| Private Disability Insurance                   | 0                                  | 0                                     | 0                | --                                       | 0                                  | 1                                     | 1                | 0.00                                     | 0                                  | 0                                     | 0                | --                                       |
| Worker's Compensation                          | 0                                  | 0                                     | 0                | --                                       | 0                                  | 1                                     | 1                | 0.00                                     | 0                                  | 0                                     | 0                | --                                       |
| Temporary Assistance for Needy Families (TANF) | 28                                 | 33                                    | 61               | 0.46                                     | 11                                 | 13                                    | 24               | 0.46                                     | 0                                  | 0                                     | 0                | --                                       |
| Retirement Income from Social Security         | 11                                 | 1                                     | 13               | 0.85                                     | 0                                  | 0                                     | 0                | --                                       | 0                                  | 0                                     | 0                | --                                       |
| Pension or retirement income from a former job | 4                                  | 3                                     | 7                | 0.57                                     | 0                                  | 0                                     | 0                | --                                       | 0                                  | 0                                     | 0                | --                                       |
| Child Support                                  | 7                                  | 21                                    | 28               | 0.25                                     | 2                                  | 9                                     | 11               | 0.18                                     | 0                                  | 0                                     | 0                | --                                       |
| Other source                                   | 169                                | 142                                   | 311              | 0.54                                     | 1                                  | 14                                    | 15               | 0.07                                     | 0                                  | 0                                     | 0                | --                                       |
| No Sources                                     | 347                                | 351                                   | 698              | 0.49                                     | 5                                  | 19                                    | 24               | 0.21                                     | 0                                  | 0                                     | 0                | --                                       |
| Unduplicated Total Adults                      | 836                                | 643                                   | 1479             |  | 22                                 | 83                                    | 105              |  | 0                                  | 0                                     | 0                |  |



**Q20a: Type of Non-Cash Benefit Sources**

|   | Benefit at Start | Benefit at Latest Annual Assessment for Stayers | Benefit at Exit for Leavers |
|---|------------------|---|-----------------------------|
| Supplemental Nutritional Assistance Program | 957              | 15  | 898                         |
| WIC   | 44               | 0   | 44                          |
| TANF Child Care Services                    | 7                | 0   | 7                           |
| TANF Transportation Services                | 3                | 0   | 6                           |
| Other TANF-Funded Services                  | 3                | 0   | 2                           |
| Other Source                                | 11               | 0   | 15                          |

**Q21: Health Insurance**

|   | At Start | At Annual Assessment for Stayers | At Exit for Leavers |
|---|----------|----------------------------------|---------------------|
| Medicaid  | 1558     | 42                               | 1391                |
| Medicare  | 132      | 2                                | 115                 |
| State Children's Health Insurance Program                       | 12       | 0                                | 12                  |
| VA Medical Services   | 38       | 0                                | 34                  |
| Employer Provided Health Insurance                              | 24       | 1                                | 22                  |
| Health Insurance Through COBRA                                  | 2        | 0                                | 2                   |
| Private Pay Health Insurance                                    | 16       | 0                                | 18                  |
| State Health Insurance for Adults                               | 20       | 1                                | 20                  |
| Indian Health Services Program                                  | 1        | 0                                | 1                   |
| Other   | 24       | 0                                | 22                  |
| No Health Insurance   | 471      | 0                                | 377                 |
| Client Doesn't Know/Client Refused                              | 0        | 0                                | 0                   |
| Data Not Collected  | 143      | 0                                | 114                 |
| Number of Stayers Not Yet Required to Have an Annual Assessment | 0        | 255                              | 0                   |
| 1 Source of Health Insurance                                    | 1596     | 44                               | 1426                |
| More than 1 Source of Health Insurance                          | 110      | 1                                | 100                 |

**Q22a2: Length of Participation - ESG Projects**

|                                | Total       | Leavers     | Stayers    |
|--------------------------------|-------------|-------------|------------|
| 0 to 7 days                    | 816         | 774         | 42         |
| 8 to 14 days                   | 360         | 330         | 30         |
| 15 to 21 days                  | 212         | 190         | 22         |
| 22 to 30 days                  | 204         | 188         | 16         |
| 31 to 60 days                  | 323         | 277         | 46         |
| 61 to 90 days                  | 96          | 79          | 17         |
| 91 to 180 days                 | 96          | 58          | 38         |
| 181 to 365 days                | 76          | 32          | 44         |
| 366 to 730 days (1-2 Yrs)      | 100         | 55          | 45         |
| 731 to 1,095 days (2-3 Yrs)    | 25          | 25          | 0          |
| 1,096 to 1,460 days (3-4 Yrs)  | 0           | 0           | 0          |
| 1,461 to 1,825 days (4-5 Yrs)  | 0           | 0           | 0          |
| More than 1,825 days (> 5 Yrs) | 0           | 0           | 0          |
| Data Not Collected             | 0           | 0           | 0          |
| <b>Total</b>                   | <b>2308</b> | <b>2008</b> | <b>300</b> |

**Q22c: Length of Time between Project Start Date and Housing Move-in Date (post 10/1/2018)**

|   | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------|------------------|--------------------------|--------------------|------------------------|
| 7 days or less                          | 9     | 6                | 3                        | 0                  | 0                      |
| 8 to 14 days                            | 5     | 5                | 0                        | 0                  | 0                      |
| 15 to 21 days                           | 7     | 1                | 6                        | 0                  | 0                      |
| 22 to 30 days                           | 12    | 3                | 9                        | 0                  | 0                      |
| 31 to 60 days                           | 23    | 5                | 18                       | 0                  | 0                      |
| 61 to 180 days                          | 14    | 2                | 12                       | 0                  | 0                      |
| 181 to 365 days                         | 5     | 0                | 5                        | 0                  | 0                      |
| 366 to 730 days (1-2 Yrs)               | 0     | 0                | 0                        | 0                  | 0                      |
| Total (persons moved into housing)      | 75    | 22               | 53                       | 0                  | 0                      |
| Average length of time to housing       | 52.00 | 30.00            | 62.00                    | -                  | -                      |
| Persons who were exited without move-in | 94    | 46               | 48                       | 0                  | 0                      |
| Total persons                           | 169   | 68               | 101                      | 0                  | 0                      |

**Q22c: RRH Length of Time between Project Start Date and Housing Move-in Date (pre 10/1/2018)**

|   | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------|------------------|--------------------------|--------------------|------------------------|
| 7 days or less                          | -     | -                | -                        | -                  | -                      |
| 8 to 14 days                            | -     | -                | -                        | -                  | -                      |
| 15 to 21 days                           | -     | -                | -                        | -                  | -                      |
| 22 to 30 days                           | -     | -                | -                        | -                  | -                      |
| 31 to 60 days                           | -     | -                | -                        | -                  | -                      |
| 61 to 180 days                          | -     | -                | -                        | -                  | -                      |
| 181 to 365 days                         | -     | -                | -                        | -                  | -                      |
| 366 to 730 days (1-2 Yrs)               | -     | -                | -                        | -                  | -                      |
| Total (persons moved into housing)      | -     | -                | -                        | -                  | -                      |
| Average length of time to housing       | -     | -                | -                        | -                  | -                      |
| Persons who were exited without move-in | -     | -                | -                        | -                  | -                      |
| Total persons                           | -     | -                | -                        | -                  | -                      |

**Q22d: Length of Participation by Household Type**

|                                | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|--------------------------------|-------|------------------|--------------------------|--------------------|------------------------|
| 7 days or less                 | 816   | 661              | 101                      | 50                 | 4                      |
| 8 to 14 days                   | 360   | 331              | 14                       | 15                 | 0                      |
| 15 to 21 days                  | 212   | 189              | 12                       | 11                 | 0                      |
| 22 to 30 days                  | 204   | 160              | 38                       | 6                  | 0                      |
| 31 to 60 days                  | 323   | 283              | 33                       | 7                  | 0                      |
| 61 to 90 days                  | 96    | 77               | 19                       | 0                  | 0                      |
| 91 to 180 days                 | 96    | 75               | 21                       | 0                  | 0                      |
| 181 to 365 days                | 76    | 36               | 40                       | 0                  | 0                      |
| 366 to 730 days (1-2 Yrs)      | 100   | 25               | 75                       | 0                  | 0                      |
| 731 to 1,095 days (2-3 Yrs)    | 25    | 10               | 15                       | 0                  | 0                      |
| 1,096 to 1,460 days (3-4 Yrs)  | 0     | 0                | 0                        | 0                  | 0                      |
| 1,461 to 1,825 days (4-5 Yrs)  | 0     | 0                | 0                        | 0                  | 0                      |
| More than 1,825 days (> 5 Yrs) | 0     | 0                | 0                        | 0                  | 0                      |
| Data Not Collected             | 0     | 0                | 0                        | 0                  | 0                      |
| Total                          | 2308  | 1847             | 368                      | 89                 | 4                      |

**Q22e: Length of Time Prior to Housing - based on 3.917 Date Homelessness Started**

|                                    | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|------------------------------------|-------|------------------|--------------------------|--------------------|------------------------|
| 7 days or less                     | 81    | 1                | 0                        | 80                 | 0                      |
| 8 to 14 days                       | 4     | 2                | 0                        | 2                  | 0                      |
| 15 to 21 days                      | 1     | 0                | 0                        | 1                  | 0                      |
| 22 to 30 days                      | 14    | 3                | 10                       | 1                  | 0                      |
| 31 to 60 days                      | 62    | 17               | 44                       | 1                  | 0                      |
| 61 to 180 days                     | 97    | 20               | 75                       | 2                  | 0                      |
| 181 to 365 days                    | 10    | 6                | 4                        | 0                  | 0                      |
| 366 to 730 days (1-2 Yrs)          | 9     | 4                | 5                        | 0                  | 0                      |
| 731 days or more                   | 4     | 0                | 2                        | 2                  | 0                      |
| Total (persons moved into housing) | 282   | 53               | 140                      | 89                 | 0                      |
| Not yet moved into housing         | 113   | 52               | 61                       | 0                  | 0                      |
| Data not collected                 | 7     | 0                | 3                        | 0                  | 4                      |
| Total persons                      | 402   | 105              | 204                      | 89                 | 4                      |

**Q23a: Exit Destination – More Than 90 Days**  
 This question is retired as of 10/1/2019.

|   | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------|------------------|--------------------------|--------------------|------------------------|
| Moved from one HOPWA funded project to HOPWA PH   | -     | -                | -                        | -                  | -                      |
| Owned by client, no ongoing housing subsidy   | -     | -                | -                        | -                  | -                      |
| Owned by client, with ongoing housing subsidy   | -     | -                | -                        | -                  | -                      |
| Rental by client, no ongoing housing subsidy  | -     | -                | -                        | -                  | -                      |
| Rental by client, with VASH housing subsidy   | -     | -                | -                        | -                  | -                      |
| Rental by client, with GPD TIP housing subsidy  | -     | -                | -                        | -                  | -                      |
| Rental by client, with other ongoing housing subsidy  | -     | -                | -                        | -                  | -                      |
| Permanent housing (other than RRH) for formerly homeless persons  | -     | -                | -                        | -                  | -                      |
| Staying or living with family, permanent tenure   | -     | -                | -                        | -                  | -                      |
| Staying or living with friends, permanent tenure  | -     | -                | -                        | -                  | -                      |
| Rental by client, with RRH or equivalent subsidy  | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| Emergency shelter, including hotel or motel paid for with emergency shelter voucher   | -     | -                | -                        | -                  | -                      |
| Moved from one HOPWA funded project to HOPWA TH   | -     | -                | -                        | -                  | -                      |
| Transitional housing for homeless persons (including homeless youth)  | -     | -                | -                        | -                  | -                      |
| Staying or living with family, temporary tenure (e.g. room, apartment or house)   | -     | -                | -                        | -                  | -                      |
| Staying or living with friends, temporary tenure (e.g. room, apartment or house)  | -     | -                | -                        | -                  | -                      |
| Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) | -     | -                | -                        | -                  | -                      |
| Safe Haven  | -     | -                | -                        | -                  | -                      |
| Hotel or motel paid for without emergency shelter voucher   | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| Foster care home or group foster care home  | -     | -                | -                        | -                  | -                      |
| Psychiatric hospital or other psychiatric facility  | -     | -                | -                        | -                  | -                      |
| Substance abuse treatment facility or detox center  | -     | -                | -                        | -                  | -                      |
| Hospital or other residential non-psychiatric medical facility  | -     | -                | -                        | -                  | -                      |
| Jail, prison, or juvenile detention facility  | -     | -                | -                        | -                  | -                      |
| Long-term care facility or nursing home   | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| Residential project or halfway house with no homeless criteria  | -     | -                | -                        | -                  | -                      |
| Deceased  | -     | -                | -                        | -                  | -                      |
| Other   | -     | -                | -                        | -                  | -                      |
| Client Doesn't Know/Client Refused  | -     | -                | -                        | -                  | -                      |
| Data Not Collected (no exit interview completed)  | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| <b>Total</b>  | -     | -                | -                        | -                  | -                      |
| Total persons exiting to positive housing destinations  | -     | -                | -                        | -                  | -                      |
| Total persons whose destinations excluded them from the calculation   | -     | -                | -                        | -                  | -                      |
| Percentage  | -     | -                | -                        | -                  | -                      |

**Q23b: Exit Destination – 90 Days or Less**  
 This question is retired as of 10/1/2019.

|   | Total | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------|------------------|--------------------------|--------------------|------------------------|
| Moved from one HOPWA funded project to HOPWA PH   | -     | -                | -                        | -                  | -                      |
| Owned by client, no ongoing housing subsidy   | -     | -                | -                        | -                  | -                      |
| Owned by client, with ongoing housing subsidy   | -     | -                | -                        | -                  | -                      |
| Rental by client, no ongoing housing subsidy  | -     | -                | -                        | -                  | -                      |
| Rental by client, with VASH housing subsidy   | -     | -                | -                        | -                  | -                      |
| Rental by client, with GPD TIP housing subsidy  | -     | -                | -                        | -                  | -                      |
| Rental by client, with other ongoing housing subsidy  | -     | -                | -                        | -                  | -                      |
| Permanent housing (other than RRH) for formerly homeless persons  | -     | -                | -                        | -                  | -                      |
| Staying or living with family, permanent tenure   | -     | -                | -                        | -                  | -                      |
| Staying or living with friends, permanent tenure  | -     | -                | -                        | -                  | -                      |
| Rental by client, with RRH or equivalent subsidy  | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| Emergency shelter, including hotel or motel paid for with emergency shelter voucher   | -     | -                | -                        | -                  | -                      |
| Moved from one HOPWA funded project to HOPWA TH   | -     | -                | -                        | -                  | -                      |
| Transitional housing for homeless persons (including homeless youth)  | -     | -                | -                        | -                  | -                      |
| Staying or living with family, temporary tenure (e.g. room, apartment or house)   | -     | -                | -                        | -                  | -                      |
| Staying or living with friends, temporary tenure (e.g. room, apartment or house)  | -     | -                | -                        | -                  | -                      |
| Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) | -     | -                | -                        | -                  | -                      |
| Safe Haven  | -     | -                | -                        | -                  | -                      |
| Hotel or motel paid for without emergency shelter voucher   | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| Foster care home or group foster care home  | -     | -                | -                        | -                  | -                      |
| Psychiatric hospital or other psychiatric facility  | -     | -                | -                        | -                  | -                      |
| Substance abuse treatment facility or detox center  | -     | -                | -                        | -                  | -                      |
| Hospital or other residential non-psychiatric medical facility  | -     | -                | -                        | -                  | -                      |
| Jail, prison, or juvenile detention facility  | -     | -                | -                        | -                  | -                      |
| Long-term care facility or nursing home   | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| Residential project or halfway house with no homeless criteria  | -     | -                | -                        | -                  | -                      |
| Deceased  | -     | -                | -                        | -                  | -                      |
| Other   | -     | -                | -                        | -                  | -                      |
| Client Doesn't Know/Client Refused  | -     | -                | -                        | -                  | -                      |
| Data Not Collected (no exit interview completed)  | -     | -                | -                        | -                  | -                      |
| <b>Subtotal</b>   | -     | -                | -                        | -                  | -                      |
| <b>Total</b>  | -     | -                | -                        | -                  | -                      |
| Total persons exiting to positive housing destinations  | -     | -                | -                        | -                  | -                      |
| Total persons whose destinations excluded them from the calculation   | -     | -                | -                        | -                  | -                      |
| Percentage  | -     | -                | -                        | -                  | -                      |

**Q23c: Exit Destination - All persons**

|   | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|-------------|------------------|--------------------------|--------------------|------------------------|
| Moved from one HOPWA funded project to HOPWA PH   | 0           | 0                | 0                        | 0                  | 0                      |
| Owned by client, no ongoing housing subsidy   | 1           | 1                | 0                        | 0                  | 0                      |
| Owned by client, with ongoing housing subsidy   | 1           | 1                | 0                        | 0                  | 0                      |
| Rental by client, no ongoing housing subsidy  | 450         | 266              | 184                      | 0                  | 0                      |
| Rental by client, with VASH housing subsidy   | 0           | 0                | 0                        | 0                  | 0                      |
| Rental by client, with GPD TIP housing subsidy  | 0           | 0                | 0                        | 0                  | 0                      |
| Rental by client, with other ongoing housing subsidy  | 70          | 37               | 33                       | 0                  | 0                      |
| Permanent housing (other than RRH) for formerly homeless persons  | 18          | 18               | 0                        | 0                  | 0                      |
| Staying or living with family, permanent tenure   | 80          | 20               | 20                       | 37                 | 3                      |
| Staying or living with friends, permanent tenure  | 24          | 15               | 7                        | 2                  | 0                      |
| Rental by client, with RRH or equivalent subsidy  | 12          | 5                | 7                        | 0                  | 0                      |
| Rental by client, with HCV voucher (tenant or project based)  | 1           | 1                | 0                        | 0                  | 0                      |
| Rental by client in a public housing unit   | 6           | 3                | 3                        | 0                  | 0                      |
| <b>Subtotal</b>   | <b>663</b>  | <b>367</b>       | <b>254</b>               | <b>39</b>          | <b>3</b>               |
| Emergency shelter, including hotel or motel paid for with emergency shelter voucher   | 130         | 113              | 13                       | 4                  | 0                      |
| Moved from one HOPWA funded project to HOPWA TH   | 0           | 0                | 0                        | 0                  | 0                      |
| Transitional housing for homeless persons (including homeless youth)  | 12          | 5                | 0                        | 7                  | 0                      |
| Staying or living with family, temporary tenure (e.g. room, apartment or house)   | 105         | 85               | 3                        | 17                 | 0                      |
| Staying or living with friends, temporary tenure (e.g. room, apartment or house)  | 71          | 63               | 2                        | 5                  | 1                      |
| Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) | 6           | 6                | 0                        | 0                  | 0                      |
| Safe Haven  | 1           | 1                | 0                        | 0                  | 0                      |
| Hotel or motel paid for without emergency shelter voucher   | 11          | 11               | 0                        | 0                  | 0                      |
| Host Home (non-crisis)  | 0           | 0                | 0                        | 0                  | 0                      |
| <b>Subtotal</b>   | <b>336</b>  | <b>284</b>       | <b>18</b>                | <b>33</b>          | <b>1</b>               |
| Foster care home or group foster care home  | 7           | 0                | 0                        | 7                  | 0                      |
| Psychiatric hospital or other psychiatric facility  | 7           | 6                | 0                        | 1                  | 0                      |
| Substance abuse treatment facility or detox center  | 7           | 6                | 0                        | 1                  | 0                      |
| Hospital or other residential non-psychiatric medical facility  | 15          | 14               | 0                        | 1                  | 0                      |
| Jail, prison, or juvenile detention facility  | 10          | 10               | 0                        | 0                  | 0                      |
| Long-term care facility or nursing home   | 1           | 1                | 0                        | 0                  | 0                      |
| <b>Subtotal</b>   | <b>47</b>   | <b>37</b>        | <b>0</b>                 | <b>10</b>          | <b>0</b>               |
| Residential project or halfway house with no homeless criteria  | 3           | 2                | 0                        | 1                  | 0                      |
| Deceased  | 1           | 1                | 0                        | 0                  | 0                      |
| Other   | 749         | 747              | 0                        | 2                  | 0                      |
| Client Doesn't Know/Client Refused  | 2           | 2                | 0                        | 0                  | 0                      |
| Data Not Collected (no exit interview completed)  | 207         | 203              | 2                        | 2                  | 0                      |
| <b>Subtotal</b>   | <b>962</b>  | <b>955</b>       | <b>2</b>                 | <b>5</b>           | <b>0</b>               |
| <b>Total</b>  | <b>2008</b> | <b>1643</b>      | <b>274</b>               | <b>87</b>          | <b>4</b>               |
| Total persons exiting to positive housing destinations  | 723         | 578              | 103                      | 39                 | 3                      |
| Total persons whose destinations excluded them from the calculation   | 25          | 17               | 0                        | 8                  | 0                      |
| Percentage  | -           | -                | -                        | -                  | -                      |

**Q24: Homelessness Prevention Housing Assessment at Exit**

|   | Total      | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|---|------------|------------------|--------------------------|--------------------|------------------------|
| Able to maintain the housing they had at project start--Without a subsidy                                     | 149        | 43               | 106                      | 0                  | 0                      |
| Able to maintain the housing they had at project start--With the subsidy they had at project start            | 34         | 11               | 23                       | 0                  | 0                      |
| Able to maintain the housing they had at project start--With an on-going subsidy acquired since project start | 0          | 0                | 0                        | 0                  | 0                      |
| Able to maintain the housing they had at project start--Only with financial assistance other than a subsidy   | 0          | 0                | 0                        | 0                  | 0                      |
| Moved to new housing unit--With on-going subsidy  | 5          | 3                | 2                        | 0                  | 0                      |
| Moved to new housing unit--Without an on-going subsidy  | 25         | 5                | 20                       | 0                  | 0                      |
| Moved in with family/friends on a temporary basis   | 0          | 0                | 0                        | 0                  | 0                      |
| Moved in with family/friends on a permanent basis   | 0          | 0                | 0                        | 0                  | 0                      |
| Moved to a transitional or temporary housing facility or program  | 0          | 0                | 0                        | 0                  | 0                      |
| Client became homeless - moving to a shelter or other place unfit for human habitation                        | 0          | 0                | 0                        | 0                  | 0                      |
| Client went to jail/prison  | 0          | 0                | 0                        | 0                  | 0                      |
| Client died   | 0          | 0                | 0                        | 0                  | 0                      |
| Client doesn't know/Client refused  | 3          | 0                | 3                        | 0                  | 0                      |
| Data not collected (no exit interview completed)  | 1          | 1                | 0                        | 0                  | 0                      |
| <b>Total</b>  | <b>217</b> | <b>63</b>        | <b>154</b>               | <b>0</b>           | <b>0</b>               |

**Q25a: Number of Veterans**

|                                    | Total       | Without Children | With Children and Adults | Unknown Household Type |
|------------------------------------|-------------|------------------|--------------------------|------------------------|
| Chronically Homeless Veteran       | 16          | 16               | 0                        | 0                      |
| Non-Chronically Homeless Veteran   | 98          | 96               | 2                        | 0                      |
| Not a Veteran                      | 1865        | 1735             | 130                      | 0                      |
| Client Doesn't Know/Client Refused | 0           | 0                | 0                        | 0                      |
| Data Not Collected                 | 0           | 0                | 0                        | 0                      |
| <b>Total</b>                       | <b>1979</b> | <b>1847</b>      | <b>132</b>               | <b>0</b>               |

**Q26b: Number of Chronically Homeless Persons by Household**

|                                    | Total       | Without Children | With Children and Adults | With Only Children | Unknown Household Type |
|------------------------------------|-------------|------------------|--------------------------|--------------------|------------------------|
| Chronically Homeless               | 380         | 363              | 16                       | 1                  | 0                      |
| Not Chronically Homeless           | 1731        | 1296             | 348                      | 87                 | 0                      |
| Client Doesn't Know/Client Refused | 8           | 4                | 4                        | 0                  | 0                      |
| Data Not Collected                 | 189         | 184              | 0                        | 1                  | 4                      |
| <b>Total</b>                       | <b>2308</b> | <b>1847</b>      | <b>368</b>               | <b>89</b>          | <b>4</b>               |





# Financial Summary Report with explanation

|   |  |                |
|---|--|----------------|
|  | Office of Community Planning and Development                                   | DATE: 10-28-21 |
|   | U.S. Department of Housing and Urban Development                               | TIME: 17:05    |
|   | Integrated Disbursement and Information System                                 | PAGE: 1        |
|   | PR25 - CDBG Financial Summary Report<br>Program Year 2020<br>MONROE COUNTY, NY |                |

|  |                  |
|--|------------------|
| <b>PART I: SUMMARY OF CDBG RESOURCES</b>                                       |                  |
| 01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR                       | 3,098,602.78     |
| 02 ENTITLEMENT GRANT   | 1,861,528.00     |
| 03 SURPLUS URBAN RENEWAL   | 0.00             |
| 04 SECTION 108 GUARANTEED LOAN FUNDS   | 0.00             |
| 05 CURRENT YEAR PROGRAM INCOME   | 174,004.03       |
| 05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)                      | 0.00             |
| 05b FUNDS RETURNED TO THE LINE-OF-CREDIT                                       | 0.00             |
| 05c FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT                                   | 0.00             |
| 07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE                                       | 0.00             |
| 08 TOTAL AVAILABLE (SUM, LINES 01-07)  | 5,134,134.81     |
| <b>PART II: SUMMARY OF CDBG EXPENDITURES</b>                                   |                  |
| 09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION | 1,792,555.77     |
| 10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT               | 0.00             |
| 11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)                       | 1,792,555.77     |
| 12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION                               | 312,001.98       |
| 13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS                                | 0.00             |
| 14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES                                    | 79,425.06        |
| 15 TOTAL EXPENDITURES (SUM, LINES 11-14)                                       | 2,183,982.81     |
| 16 UNEXPENDED BALANCE (LINE 08 - LINE 15)                                      | 2,950,152.00     |
| <b>PART III: LOW/MOD BENEFIT THIS REPORTING PERIOD</b>                         |                  |
| 17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS                               | 0.00             |
| 18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING                                     | 0.00             |
| 19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES                                      | 1,792,555.77     |
| 20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT                                  | 0.00             |
| 21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)                                     | 1,792,555.77     |
| 22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)                                    | 100.00%          |
| <b>LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS</b>                           |                  |
| 23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION                                  | PY: 2020 PY: PY: |
| 24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION          | 0.00             |
| 25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS                          | 0.00             |
| 26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)                        | 0.00%            |
| <b>PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS</b>                           |                  |
| 27 DISBURSED IN IDIS FOR PUBLIC SERVICES                                       | 209,603.21       |
| 28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR                  | 0.00             |
| 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR                 | 35,185.13        |
| 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS                                  | 79,425.06        |
| 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)                | 253,863.14       |
| 32 ENTITLEMENT GRANT   | 1,861,528.00     |
| 33 PRIOR YEAR PROGRAM INCOME   | 79,351.70        |
| 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP                               | 0.00             |
| 35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)                                  | 1,940,879.70     |
| 36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)                 | 13.08%           |
| <b>PART V: PLANNING AND ADMINISTRATION (PA) CAP</b>                            |                  |
| 37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION                               | 312,001.98       |
| 38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR                  | 161,721.86       |
| 39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR                 | 139,185.85       |
| 40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS                                  | 44,730.57        |
| 41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)                 | 379,258.56       |
| 42 ENTITLEMENT GRANT   | 1,861,528.00     |
| 43 CURRENT YEAR PROGRAM INCOME   | 174,004.03       |
| 44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP                               | 30,000.00        |
| 45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)                                  | 2,085,532.03     |
| 46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)                 | 18.36%           |



Office of Community Planning and Development  
 U.S. Department of Housing and Urban Development  
 Integrated Disbursement and Information System  
 FR25 - CDBG Financial Summary Report  
 Program Year 2020  
 MONROE COUNTY, NY

DATE: 10-28-21  
 TIME: 17:05  
 PAGE: 2

LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17  
 Report returned no data.

LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18  
 Report returned no data.

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

| Plan Year | IDIS Project | IDIS Activity | Voucher Number | Activity Name  | Matrix Code | National Objective | Drawn Amount |
|-----------|--------------|---------------|----------------|--|-------------|--------------------|--------------|
| 2018      | 4            | 4256          | 6431453        | T/HamIn Redman Road Water District                     | 03J         | LMA                | \$65,000.00  |
| 2018      | 10           | 4278          | 6440970        | W/Fairport Sanitary Sewer Lining                       | 03J         | LMA                | \$27,419.50  |
| 2018      | 10           | 4278          | 6457716        | W/Fairport Sanitary Sewer Lining                       | 03J         | LMA                | \$0.00       |
| 2019      | 3            | 4443          | 6468101        | T/Hennietta Sanitary Sewer Slip Lining, YR44           | 03J         | LMA                | \$38,463.40  |
| 2020      | 41           | 4427          | 6505581        | LeHigh Station Sanitary Sewer, T/Hanricketa            | 03J         | LMA                | \$50,000.00  |
| 2020      | 46           | 4425          | 6479654        | Phillips Road Sewer Project, Webster Village           | 03J         | LMA                | \$67,410.00  |
|           |              |               |                |  | 03J         | Matrix Code        | \$248,292.96 |
| 2019      | 2            | 4395          | 6427582        | Nisa Lane Gutter Replacement, Gates                    | 03K         | LMA                | \$50,000.00  |
| 2019      | 6            | 4394          | 6422524        | Road Rehab & Resurfacing, East Rochester               | 03K         | LMA                | \$120,000.00 |
|           |              |               |                |  | 03K         | Matrix Code        | \$170,000.00 |
| 2015      | 19           | 3039          | 6431453        | Empire Blvd Sidewalk Imp Town of Penfield              | 03L         | LMA                | \$70,000.02  |
| 2018      | 6            | 4412          | 6431453        | Willow Pond Sidewalk Replacement, Penfield             | 03L         | LMA                | \$49,374.58  |
| 2018      | 12           | 4396          | 6431453        | Darka Place Sidewalk Replacement, Scottsville          | 03L         | LMA                | \$21,338.00  |
| 2019      | 4            | 4402          | 6422524        | Holley Street Sidewalk, Sweden                         | 03L         | LMA                | \$68,000.00  |
| 2019      | 8            | 4401          | 6427582        | ADA Pedestrian Crossing, Hilton                        | 03L         | LMA                | \$36,725.00  |
| 2019      | 9            | 4389          | 6415154        | East Main Street Sidewalk Replacement, Webster Village | 03L         | LMA                | \$87,378.00  |
|           |              |               |                |  | 03L         | Matrix Code        | \$334,815.60 |
| 2019      | 10           | 4348          | 6409550        | Safety and Security for Seniors                        | 05A         | LWC                | \$5,837.42   |
| 2020      | 25           | 4433          | 6440970        | LifeSpan Safety and Security for Seniors - YR45        | 05A         | LWC                | \$11,211.03  |
| 2020      | 25           | 4433          | 6479654        | LifeSpan Safety and Security for Seniors - YR45        | 05A         | LWC                | \$12,736.27  |
| 2020      | 25           | 4433          | 6510681        | LifeSpan Safety and Security for Seniors - YR45        | 05A         | LWC                | \$13,494.29  |
|           |              |               |                |  | 05A         | Matrix Code        | \$43,279.01  |
| 2019      | 11           | 4352          | 6409550        | Classified Scanning and Shredding Services             | 05B         | LWC                | \$25,683.46  |
| 2020      | 26           | 4442          | 6464755        | LAI Hard Drive Destruction- YR45                       | 05B         | LMCSV              | \$32,000.00  |
|           |              |               |                |  | 05B         | Matrix Code        | \$57,683.46  |
| 2019      | 13           | 4350          | 6405471        | Expanding Housing Opportunities                        | 05K         | LWC                | \$11,499.65  |
| 2020      | 26           | 4430          | 6454213        | THC Expanding Housing Opportunities- YR45              | 05K         | LWC                | \$9,771.40   |
| 2020      | 26           | 4430          | 6474556        | THC Expanding Housing Opportunities- YR45              | 05K         | LWC                | \$2,166.32   |
| 2020      | 26           | 4430          | 6500398        | THC Expanding Housing Opportunities- YR45              | 05K         | LWC                | \$12,089.27  |
|           |              |               |                |  | 05K         | Matrix Code        | \$35,526.64  |
| 2019      | 14           | 4349          | 6405471        | Foreclosure Prevention                                 | 05J         | LWC                | \$10,215.74  |
| 2020      | 29           | 4431          | 6454213        | THC Foreclosure Prevention - YR 45                     | 05J         | LWC                | \$10,958.68  |
| 2020      | 29           | 4431          | 6474556        | THC Foreclosure Prevention - YR 45                     | 05J         | LWC                | \$10,470.01  |
| 2020      | 29           | 4431          | 6500398        | THC Foreclosure Prevention - YR 45                     | 05J         | LWC                | \$12,190.68  |
|           |              |               |                |  | 05J         | Matrix Code        | \$43,835.11  |
| 2020      | 30           | 4432          | 6454213        | THC Homeownership Program - YR45                       | 05Y         | LWH                | \$2,666.48   |
| 2020      | 30           | 4432          | 6474556        | THC Homeownership Program - YR45                       | 05Y         | LWH                | \$13,998.39  |
| 2020      | 30           | 4432          | 6500398        | THC Homeownership Program - YR45                       | 05Y         | LWH                | \$12,614.12  |
|           |              |               |                |  | 05Y         | Matrix Code        | \$29,279.99  |
| 2019      | 15           | 4351          | 6405471        | Homeownership Program                                  | 13A         | LWH                | \$7,612.32   |
|           |              |               |                |  | 13A         | Matrix Code        | \$7,612.32   |
| 2014      | 2            | 4340          | 6444983        | 10 Sundew Lane   | 14A         | LWH                | \$4,999.00   |
| 2014      | 2            | 4377          | 6431453        | 72 Falcon Drive  | 14A         | LWH                | \$11,384.00  |
| 2014      | 2            | 4381          | 6440970        | 72 Falcon Drive  | 14A         | LWH                | \$3,403.75   |
| 2014      | 2            | 4403          | 6409550        | 1742 Hilton Farms Cms. Lt. 24                          | 14A         | LWH                | \$10,000.00  |
| 2014      | 2            | 4488          | 6510681        | 464 Armstrong Road                                     | 14A         | LWH                | \$14,962.50  |
| 2015      | 13           | 4405          | 6415154        | 9 Dotts Lane, Brookport                                | 14A         | LWH                | \$10,000.00  |
| 2015      | 13           | 4408          | 6468101        | 97 Elvira Street                                       | 14A         | LWH                | \$19,325.00  |
| 2015      | 13           | 4422          | 6427582        | 24 Mill Street   | 14A         | LWH                | \$5,000.00   |
| 2015      | 13           | 4447          | 6462344        | 124 N. Lincoln Rd                                      | 14A         | LWH                | \$14,625.00  |
| 2015      | 13           | 4448          | 6462344        | 124 N. Lincoln Rd                                      | 14A         | LWH                | \$5,000.00   |
| 2015      | 13           | 4452          | 6468101        | 101 Hubbard Drive                                      | 14A         | LWH                | \$14,700.00  |
| 2015      | 13           | 4462          | 6479654        | 101 Hubbard Drive                                      | 14A         | LWH                | \$4,900.00   |
| 2015      | 13           | 4464          | 6479654        | 32 Monroe Street                                       | 14A         | LWH                | \$14,999.00  |
| 2015      | 13           | 4465          | 6479654        | 63 Shell Edge Drive                                    | 14A         | LWH                | \$13,825.00  |
| 2015      | 13           | 4466          | 6479654        | 154 Westside Drive                                     | 14A         | LWH                | \$18,994.00  |
| 2015      | 13           | 4467          | 6479654        | 19 Meadowlark Drive                                    | 14A         | LWH                | \$15,000.00  |
| 2015      | 13           | 4468          | 6479654        | 19 Meadowlark Drive                                    | 14A         | LWH                | \$5,300.00   |
| 2015      | 13           | 4470          | 6483895        | 5839 Chili Riga Road, J108                             | 14A         | LWH                | \$7,500.00   |
| 2015      | 13           | 4472          | 6491673        | 1568 Scribner Road                                     | 14A         | LWH                | \$20,000.00  |
| 2016      | 22           | 4406          | 6415154        | 284 Beechwood Crescent                                 | 14A         | LWH                | \$20,000.00  |



Office of Community Planning and Development  
 U.S. Department of Housing and Urban Development  
 Integrated Disbursement and Information System  
 FR25 - CDBG Financial Summary Report  
 Program Year 2020  
 MONROE COUNTY, NY

DATE: 10-28-21  
 TIME: 17:05  
 PAGE: 3

| Plan Year | IDIS Project | IDIS Activity | Voucher Number | Activity Name                         | Matrix Code | National Objective | Drawn Amount          |
|-----------|--------------|---------------|----------------|---------------------------------------|-------------|--------------------|-----------------------|
| 2016      | 22           | 4414          | 6418872        | 40 Rawhide Drive                      | 14A         | LWH                | \$15,000.00           |
| 2016      | 22           | 4435          | 6440970        | 28 Farmingdale Drive                  | 14A         | LWH                | \$6,596.25            |
| 2016      | 22           | 4473          | 6494755        | 60 Black Creek Road                   | 14A         | LWH                | \$14,612.50           |
| 2016      | 22           | 4474          | 6494755        | 60 Black Creek Road                   | 14A         | LWH                | \$4,937.50            |
| 2016      | 22           | 4475          | 6494755        | 51 Fondiller Avenue                   | 14A         | LWH                | \$7,500.00            |
| 2016      | 22           | 4476          | 6494755        | 51 Fondiller Avenue                   | 14A         | LWH                | \$2,500.00            |
| 2016      | 22           | 4481          | 6500398        | 180 Clark Street                      | 14A         | LWH                | \$19,050.00           |
| 2016      | 22           | 4482          | 6510581        | 18 Deland Park B                      | 14A         | LWH                | \$20,000.00           |
| 2016      | 22           | 4483          | 6505581        | 16 Pinewood Drive                     | 14A         | LWH                | \$7,230.00            |
| 2016      | 22           | 4497          | 6520886        | 5630 Chili Riga Center Lot C9         | 14A         | LWH                | \$10,000.00           |
| 2017      | 18           | 4489          | 6510581        | 464 Armstrong Road                    | 14A         | LWH                | \$4,987.50            |
| 2018      | 20           | 4275          | 6431453        | 218 Jordan Avenue                     | 14A         | LWH                | \$4,999.00            |
| 2018      | 20           | 4446          | 6457716        | 60 Landau Drive                       | 14A         | LWH                | \$19,100.00           |
| 2018      | 20           | 4446          | 6500398        | 60 Landau Drive                       | 14A         | LWH                | \$5,899.00            |
| 2018      | 20           | 4485          | 6510581        | 78 Apache Trail                       | 14A         | LWH                | \$20,000.00           |
| 2019      | 16           | 4398          | 6431453        | 231 River Meadow Drive                | 14A         | LWH                | \$5,424.00            |
| 2019      | 16           | 4392          | 6405471        | 26 Riverview Heights                  | 14A         | LWH                | \$19,995.00           |
| 2019      | 16           | 4479          | 6500398        | 41 Morrison Avenue                    | 14A         | LWH                | \$19,525.00           |
| 2019      | 16           | 4479          | 6523419        | 41 Morrison Avenue                    | 14A         | LWH                | \$4,999.00            |
| 2020      | 31           | 4400          | 6457716        | 57 Blue Pond Way                      | 14A         | LWH                | \$20,000.00           |
| 2020      | 31           | 4418          | 6418872        | 40 Rawhide Drive                      | 14A         | LWH                | \$5,000.00            |
| 2020      | 31           | 4420          | 6422524        | 14 Old Beahan Road                    | 14A         | LWH                | \$5,000.00            |
| 2020      | 31           | 4461          | 6474556        | 755 Tanya Circle                      | 14A         | LWH                | \$8,700.00            |
| 2020      | 31           | 4463          | 6479654        | 7 Iva Mae Drive                       | 14A         | LWH                | \$20,000.00           |
| 2020      | 31           | 4480          | 6500398        | 56 Shadycreek Road                    | 14A         | LWH                | \$20,000.00           |
|           |              |               |                |                                       |             |                    | <b>\$525,972.00</b>   |
| 2019      | 19           | 4354          | 6418872        | Program delivery - Home Improvement   | 14H         | LWC                | \$5,749.68            |
| 2020      | 37           | 4492          | 6510734        | Program Delivery - Comm Dev           | 14H         | LWH                | \$15,000.00           |
|           |              |               |                |                                       |             |                    | <b>\$21,749.68</b>    |
| 2014      | 45           | 4343          | 6405471        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6409550        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6418872        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6422524        | HIP Lead testing                      | 14I         | LWH                | \$825.00              |
| 2014      | 45           | 4343          | 6431453        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6440970        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6444890        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6457716        | HIP Lead testing                      | 14I         | LWH                | \$650.00              |
| 2014      | 45           | 4343          | 6462344        | HIP Lead testing                      | 14I         | LWH                | \$650.00              |
| 2014      | 45           | 4343          | 6468101        | HIP Lead testing                      | 14I         | LWH                | \$1,100.00            |
| 2014      | 45           | 4343          | 6474556        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6479654        | HIP Lead testing                      | 14I         | LWH                | \$1,185.00            |
| 2014      | 45           | 4343          | 6483865        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6491673        | HIP Lead testing                      | 14I         | LWH                | \$275.00              |
| 2014      | 45           | 4343          | 6494755        | HIP Lead testing                      | 14I         | LWH                | \$825.00              |
| 2014      | 45           | 4343          | 6500398        | HIP Lead testing                      | 14I         | LWH                | \$625.00              |
| 2014      | 45           | 4343          | 6510581        | HIP Lead testing                      | 14I         | LWH                | \$650.00              |
| 2020      | 32           | 4467          | 6510581        | Lead testing Home Improvement Program | 14I         | LWH                | \$275.00              |
| 2020      | 32           | 4487          | 6520886        | Lead testing Home Improvement Program | 14I         | LWH                | \$650.00              |
|           |              |               |                |                                       |             |                    | <b>\$9,510.00</b>     |
| 2016      | 23           | 4390          | 6397242        | Mercury Print Productions             | 18A         | LWC                | \$265,000.00          |
|           |              |               |                |                                       |             |                    | <b>\$265,000.00</b>   |
|           |              |               |                |                                       |             |                    | <b>\$1,792,855.77</b> |

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

| Plan Year | IDIS Project | IDIS Activity | Voucher Number | Activity to prevent, prepare for, and respond to Coronavirus | Activity Name                                   | Grant Number | Fund Type | Matrix Code | National Objective | Drawn Amount       |
|-----------|--------------|---------------|----------------|--|---|--------------|-----------|-------------|--------------------|--------------------|
| 2019      | 10           | 4348          | 6409550        | No   | Safety and Security for Seniors                 | B19UC360002  | EN        | 05A         | LWC                | \$5,837.42         |
| 2020      | 25           | 4433          | 6440970        | No   | LifeSpan Safety and Security for Seniors - YR45 | B20UC360002  | EN        | 05A         | LWC                | \$11,211.03        |
| 2020      | 25           | 4433          | 6479654        | No   | LifeSpan Safety and Security for Seniors - YR45 | B20UC360002  | EN        | 05A         | LWC                | \$12,736.27        |
| 2020      | 25           | 4433          | 6510581        | No   | LifeSpan Safety and Security for Seniors - YR45 | B20UC360002  | EN        | 05A         | LWC                | \$13,494.29        |
|           |              |               |                |  |   |              |           |             |                    | <b>\$43,279.01</b> |
| 2019      | 11           | 4352          | 6409550        | No   | Classified Scanning and Shredding Services      | B19UC360002  | EN        | 05B         | LWC                | \$25,683.46        |
| 2020      | 26           | 4442          | 6494755        | No   | LAI Hard Drive Destruction- YR45                | B20UC360002  | EN        | 05B         | LWCSV              | \$32,000.00        |
|           |              |               |                |  |   |              |           |             |                    | <b>\$57,683.46</b> |
| 2019      | 13           | 4350          | 6405471        | No   | Expanding Housing Opportunities                 | B19UC360002  | EN        | 05K         | LWC                | \$11,499.85        |
| 2020      | 28           | 4430          | 6454213        | No   | THC Expanding Housing Opportunities- YR45       | B20UC360002  | EN        | 05K         | LWC                | \$9,771.40         |



Office of Community Planning and Development  
 U.S. Department of Housing and Urban Development  
 Integrated Disbursement and Information System  
 FR25 - CD6G Financial Summary Report  
 Program Year 2020  
 MONROE COUNTY, NY

DATE: 10-28-21  
 TIME: 17:05  
 PAGE: 4

| Plan Year    | IDIS Project | IDIS Activity | Voucher Number | Activity to prevent, prepare for, and respond to Coronavirus | Activity Name  | Grant Number | Fund Type | Matrix Code | National Objective | Drawn Amount        |
|--------------|--------------|---------------|----------------|--|--|--------------|-----------|-------------|--------------------|---------------------|
| 2020         | 28           | 4430          | 6474556        | No   | THC Expanding Housing Opportunities- YR45                    | B20UC360002  | EN        | 05K         | LWC                | \$2,166.32          |
| 2020         | 28           | 4430          | 6500398        | No   | THC Expanding Housing Opportunities- YR45                    | B20UC360002  | EN        | 05K         | LWC                | \$12,089.27         |
|              |              |               |                |  |  |              |           | 05K         | Matrix Code        | \$35,526.64         |
| 2019         | 14           | 4349          | 6405471        | No   | Foreclosure Prevention                                       | B19UC360002  | EN        | 05U         | LWH                | \$10,215.74         |
| 2020         | 29           | 4431          | 6454213        | No   | THC Foreclosure Prevention - YR 45                           | B20UC360002  | EN        | 05U         | LWC                | \$10,958.68         |
| 2020         | 29           | 4431          | 6474556        | No   | THC Foreclosure Prevention - YR 45                           | B20UC360002  | EN        | 05U         | LWC                | \$10,470.01         |
| 2020         | 29           | 4431          | 6500398        | No   | THC Foreclosure Prevention - YR 45                           | B20UC360002  | EN        | 05U         | LWC                | \$12,190.68         |
|              |              |               |                |  |  |              |           | 05U         | Matrix Code        | \$43,835.11         |
| 2020         | 30           | 4432          | 6454213        | No   | THC Homeownership Program - YR45                             | B20UC360002  | EN        | 05Y         | LWH                | \$2,666.48          |
| 2020         | 30           | 4432          | 6474556        | No   | THC Homeownership Program - YR45                             | B20UC360002  | EN        | 05Y         | LWH                | \$13,996.39         |
| 2020         | 30           | 4432          | 6500398        | No   | THC Homeownership Program - YR45                             | B20UC360002  | EN        | 05Y         | LWH                | \$12,614.12         |
|              |              |               |                |  |  |              |           | 05Y         | Matrix Code        | \$29,278.99         |
|              |              |               |                | No   | Activity to prevent, prepare for, and respond to Coronavirus |              |           |             |                    | \$209,603.21        |
| <b>Total</b> |              |               |                |  |  |              |           |             |                    | <b>\$209,603.21</b> |

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

| Plan Year    | IDIS Project | IDIS Activity | Voucher Number | Activity Name  | Matrix Code | National Objective | Drawn Amount        |
|--------------|--------------|---------------|----------------|--|-------------|--------------------|---------------------|
| 2020         | 35           | 4437          | 6444860        | Program Delivery-ED                                  | 20          |                    | \$15,000.00         |
| 2020         | 36           | 4438          | 6444860        | Program Delivery - Planning                          | 20          |                    | \$15,000.00         |
|              |              |               |                |  | 20          | Matrix Code        | \$30,000.00         |
| 2019         | 18           | 4355          | 6418872        | CD6G General Administration                          | 21A         |                    | \$43,009.80         |
| 2019         | 18           | 4355          | 6431453        | CD6G General Administration                          | 21A         |                    | \$40,154.86         |
| 2019         | 18           | 4355          | 6447698        | CD6G General Administration                          | 21A         |                    | \$29,969.35         |
| 2019         | 18           | 4355          | 6460491        | CD6G General Administration                          | 21A         |                    | \$26,051.74         |
| 2020         | 34           | 4410          | 6447698        | CD6G Admin   | 21A         |                    | \$9,910.13          |
| 2020         | 34           | 4410          | 6460491        | CD6G Admin   | 21A         |                    | \$20,014.23         |
| 2020         | 34           | 4410          | 6500398        | CD6G Admin   | 21A         |                    | \$94,560.76         |
| 2020         | 34           | 4410          | 6510681        | CD6G Admin   | 21A         |                    | \$12,781.01         |
|              |              |               |                |  | 21A         | Matrix Code        | \$276,451.98        |
| 2019         | 18           | 4365          | 6415154        | Planning Services - 5 Yr Con Plan & Update to the AI | 21D         |                    | \$5,550.00          |
|              |              |               |                |  | 21D         | Matrix Code        | \$5,550.00          |
| <b>Total</b> |              |               |                |  |             |                    | <b>\$312,001.98</b> |

**PR26 ADJUSTEMENT NARRATIVE**

Adjustments were made to the PR26 as described below:

1. Line 10 (of Part II) and 30 (of Part IV) to reflect Public Service vouchers received after the reporting period for reimbursement of the last quarter of our program year. These vouchers were as follows:

| IDIS         | PROGRAM NAME                    | AMOUNT             | DATE    | PERIOD COVERED  |
|--------------|---------------------------------|--------------------|---------|-----------------|
| 4431         | Foreclosure Prevention          | \$16,380.63        | 8/18/21 | May 1 – July 31 |
| 4430         | Expanding Housing               | \$25,973.01        | 8/18/21 | May 1 – July 31 |
| 4432         | First Time Homebuyer Program    | \$30,721.01        | 8/18/21 | May 1 – July 31 |
| 4433         | Safety and Security For Seniors | \$6,350.41         | 8/30/21 | May 1 – July 31 |
| <b>TOTAL</b> |                                 | <b>\$79,425.06</b> |         |                 |

2. Line 14 (of Part II) and line 40 (of Part V) to reflect the June and July admin expenses which were drawn after the reporting period. These Vouchers were as follows:

| IDIS         | PROGRAM NAME       | AMOUNT             | DATE    | PERIOD COVERED |
|--------------|--------------------|--------------------|---------|----------------|
| 4410         | CDBG General Admin | \$20,805.25        | 9/13/21 | June 2021      |
| 4410         | CDBG General Admin | \$23,925.32        | 9/13/21 | July 2021      |
| <b>TOTAL</b> |                    | <b>\$44,730.57</b> |         |                |

3. Line 38 (of Part V) to reflect our current remaining unspent Admin (\$161,721.86) and line 39 (of Part V) to more accurately reflect what we had remaining at the end of the last program year for admin (\$139,185.85).

# Loan Portfolio

**CDBG Economic Development Loan Portfolio**  
for Program Year 9/31/2020 to 9/30/2021

| Active Loans                                   |            |               |       |                     |          |               |                    |                     |                  |                 |                             |                     |
|--|------------|---------------|-------|---------------------|----------|---------------|--------------------|---------------------|------------------|-----------------|-----------------------------|---------------------|
| Company  | Issue Date | Loan to Grant | Staff | Loan Amount         | Term     | Interest Rate | Monthly Payment    | Balance             | Payment Status   | Jobs at App.    | Job Creation Requirements   | Job Creation Status |
| 1 Bozze Pasta LLC                              | 03/27/19   | No            | LB    | \$ 140,000.00       | 7 years  | 3.50%         | \$ 1,881.58        | \$ 97,063.02        | Paying As Agreed | 2 ft and 9 part | 4 full time employees       | pending             |
| 3 Mercury Print                                | 09/2020    | No            | LB    | \$ 285,000.00       | 10 years | 3.5           | \$ 2,620.00        | \$ 242,470.10       | Paying As Agreed | 225             | 6 full time perm. positions | 9 of 9 jobs created |
| <b>Total Committed and Balance Outstanding</b> |            |               |       | <b>\$425,000.00</b> |          |               | <b>\$ 4,501.58</b> | <b>\$139,533.18</b> |                  |                 |                             |                     |
|  |            |               |       |                     |          |               |                    |                     |                  |                 |                             |                     |
|  |            |               |       |                     |          |               |                    |                     |                  |                 |                             |                     |



**Monroe County  
Affordable Rental Housing Loan Portfolio**

| MONTHLY DUE DATE (DEFERRED PRINCIPAL PERMANENT LOAN SUMMARY OF ANNUAL INTEREST-ONLY PAYMENTS) |                                      |                  |             |      |      |                |                      |   |
|---|--------------------------------------|------------------|-------------|------|------|----------------|----------------------|---|
| Rental Project  | Developer/Owner                      | Date Loan Issued | Loan Amount | Term | Rate | Annual Payment | Date of Last Payment | Annual Interest-Only Payment Due Date / Comments  |
| <b>January</b>  |                                      |                  |             |      |      |                |                      |   |
| West Town Village<br>60 Hendon Road, (Henrietta)  | Providence Housing Development Corp. | 12/7/1999        | \$300,000   | 30   | 1%   | \$3,000        | 1/3/2020             | Interest-Only Payments Due: Jan. 6th PHDC also has a \$50,000 CDBG Grant Current - Next payment due 1/6/2021                            |
| ADA Ridge II & 1311 Long Pond Road, (Greece)  | Pathstone                            | 6/25/2008        | \$500,000   | 50   | 1%   | \$5,000        | 6/18/2020            | Interest-Only Payments Due: March 28th - CURRENT - Next payment due 3/26/2021   |
| Rockwood Senior Housing<br>1136 Buffalo Road, (Henrietta)                                     | Providence Housing Development Corp. | 12/18/2013       | \$300,000   | 40   | 1%   | \$3,000        | 3/26/2017            | Interest-Only Payments Due: Jan. 30th Insufficient Cash Flow. Audited Financials in File. Next payment due 01/30/2021                   |
| VOA Cobblestone Place, (Webster)  | Canifer Realty                       | 12/30/2016       | \$120,000   | 30   | 1%   | \$1,200        | 1/10/2020            | Interest-Only Payments Due: Jan. 28th CURRENT - Next payment due 01/26/2021   |
| Hobbs Creek Apts. III & 135 Brewer Rd., (Irondequoit)   | Rural Housing Opportunities Corp.    | 12/27/2002       | \$400,000   | 30   | 1%   | \$4,000        | 4/10/2019            | Interest-Only Payments Due: Jan. 29th Missed Pymt - CV - Next payment due 01/26/2021  |
| Heritage Gardens, (Henrietta)   | Heritage Christian Services          | 04/27/2017       | \$300,000   | 40   | 1%   | \$3,000        | 1 <sup>st</sup> year | Interest-Only Payments Due: Jan. 30th Missed Pymt - CV - Next payment due 1/30/2021   |
| Durand Senior Apartments, (Irondequoit)   | Providence Housing Development Corp. | 11/03/2017       | \$350,000   | 30   | 1%   | \$3,500        | 2/3/2020             | Interest-Only Payments Due: Jan. 21 <sup>st</sup> CURRENT - Next payment due 01/21/2021   |
| <b>February</b>   |                                      |                  |             |      |      |                |                      |   |
| St. Andrew's Apts.<br>1180 Buffalo Road, (Genesee)  | Providence Housing Development Corp. | 12/31/2002       | \$100,000   | 20   | 1%   | \$1,000        | 2/19/2020            | Interest-Only Payments Due: Feb. 14th PHDC also has a \$25,000 CDBG Grant - CURRENT - Next payment due 2/14/2021                        |
| <b>March</b>  |                                      |                  |             |      |      |                |                      |   |
| Union Park<br>49 Union Square Blvd. (Chili)   | Providence Housing Development Corp. | 12/31/2003       | \$500,000   | 20   | 1%   | \$5,000        | 3/3/2020             | Interest-Only Payments Due: March 6th CURRENT - Next payment due 3/6/2021   |
| <b>April</b>  |                                      |                  |             |      |      |                |                      |   |
| Briarwood Place<br>2-64 Nathaniel Dr., (Scottsville)  | Housing Opportunities, Inc. (HOP)    | 3/27/1998        | \$470,000   | 20   | 1%   | \$4,700        | 7/2/2020             | Interest-Only Payments Due: April 26th (1999) Refinanced - new term 2021 CURRENT - Next payment 7/2/2021                                |
| Hilton Park<br>100 Leith Lane, (Hilton)   | Unity Health System                  | 2/23/2006        | \$300,000   | 30   | 1%   | \$3,000        | 4/20/2019            | 1st Annual Interest Payment is Due 4/20/07 Interest-Only Payments Due: April 20th (2007) Missed Pymt - CV - Next payment due 4/20/2021. |
| St. Salome Apts.<br>4242 & 4282 Culver Road, (Irondequoit)                                    | Providence Housing Development Corp. | 3/10/2008        | \$450,000   | 30   | 1%   | \$4,500        | 5/1/2020             | Interest-Only Payment Due: April 13th (2010 - Years 1 & 2) CURRENT - Next payment due 4/13/2021   |
| (Continued on Next Page)  |                                      |                  |             |      |      |                |                      |   |

10/24/2019

**Monroe County  
Affordable Rental Housing Loan Portfolio**

| MONTHLY DUE DATE (DEFERRED PRINCIPAL PERMANENT LOAN SUMMARY OF ANNUAL INTEREST-ONLY PAYMENTS) |   |                  |             |      |      |                |                      |   |
|---|---|------------------|-------------|------|------|----------------|----------------------|---|
| (Page 2 - Continued)<br>Rental Project  | Developer/Owner                               | Date Loan Issued | Loan Amount | Term | Rate | Annual Payment | Date of Last Payment | Annual Interest-Only Payment Due Date / Comments  |
| <b>May</b>  |   |                  |             |      |      |                |                      |   |
| Ogden Gardens, (Spencerport)  | Home Leasing                                  | 11/5/2010        | \$100,000   | 30   | 1%   | \$2,814        | 1/15/2020            | Interest Only Payment Current Next Payment Due 1/15/2021  |
| Canal Place, 82-110 Samuel Woy, (Greece)  | Housing Opportunities, Inc. (HOP)             | 4/18/2002        | \$300,000   | 30   | 1%   | \$3,000        | 12/16/2019           | Interest-Only Payments Due: May 18th - Missed Pymt (2017) Next payment due 5/18/2021  |
| <b>July</b>   |   |                  |             |      |      |                |                      |   |
| Crerand Commons<br>Cromwell Circle, (Genesee)   | Housing Opportunities, Inc. (HOP)             | 5/18/2004        | \$200,000   | 30   | 1%   | \$2,000        | 7/10/2020            | Interest-Only Payments Due: July 1st (2005) CURRENT - Next payment due 07/01/2021   |
| Seneca Place, 300 Pw. Trail, (Seneca Falls)   | Seneca Place, LLC, c/o Canifer Realty, LLC    | 6/9/2007         | \$300,000   | 30   | 1%   | \$3,000        | 7/7/2020             | Interest-Only Payments Due: July 7th (2008) CURRENT - Next payment due 07/07/2021   |
| Union Meadows<br>2-66 Linnea Lane (Chili)   | Providence Housing Development Corp.          | 2/1/2016         | \$450,000   | 10   | 1%   | \$4,500        | 5/1/2020             | Interest-Only Payments Due: July 29th (1998) CURRENT - Next payment due 07/29/2021  |
| Crosman Senior Apts.<br>42 East Ave., (Fairport)  | Baldwin Real Estate Development Corp.         | 7/20/2003        | \$450,000   | 20   | 1%   | \$4,500        | 7/8/2020             | Interest-Only Payments Due: July 20th (2003) - Next payment due 07/20/2021  |
| Union Meadows II<br>2-66 Linnea Lane (Chili)  | Providence Housing Development Corp.          | 9/15/2009        | \$800,000   | 30   | 1%   | \$8,000        | 8/21/2020            | Interest- and Principal Payments Due: Aug 22 <sup>nd</sup> (Refinanced) - Next payment due 08/23/2021                         |
| Elliott's Landing<br>25 Linhome Dr., (Henrietta)  | Housing Opportunities, Inc. (HOP)             | 6/22/2006        | \$200,000   | 30   | 1%   | \$2,000        | 7/26/2020            | 1st Annual Interest Payment is Due 7/26/07 Interest-Only Payments Due: July 28th (2007) CURRENT - Next payment due 07/28/2021 |
| <b>October</b>  |   |                  |             |      |      |                |                      |   |
| Frances Apartments I, (Sweden)  | Rochester Cornerstone Group/Lifetime Dev Corp | 11/1/2016        | \$200,000   | 30   | 1%   | \$2,000        | 10/31/2020           | Interest-Only Payments Due: Oct. 1 <sup>st</sup> CURRENT - Next payment due 10/1/2021   |
| <b>November</b>   |   |                  |             |      |      |                |                      |   |
| Monarch Senior Living-<br>Hard Rd. II (Webster)   | CDS   | 9/19/2017        | \$200,000   | 30   | 1%   | \$2,000        | 11/17/2020           | Interest-Only Payments Due: Nov. 19th CURRENT - Next payment due 11/19/2020   |
| <b>December</b>   |   |                  |             |      |      |                |                      |   |
| Jefferson Park Apts.<br>120 Jefferson Ave., (Perinton)  | Canifer HP-BC LLC                             | 11/15/2000       | \$300,000   | 30   | 1%   | \$3,000        | 12/3/2019            | Interest-Only Payments Due: Dec. 19th (2001) CURRENT - Next payment due 12/15/2020  |
| FAT Apartments,<br>(Fairport)   | Rochester Cornerstone Group                   | 11/18/2011       | \$250,000   | 30   | 1%   | \$2,500        | 12/31/2019           | Interest-Only Payments Due: Dec. 18th (2014) CURRENT - Next payment due 12/18/2020  |
| Stonewood Apts,<br>Henrietta  | Pathstone/Wjyn Development                    | 12/31/2011       | \$300,000   | 30   | 1%   | \$3,000        | 4/22/2019            | Interest-Only Payments Due: Dec. 18th Missed Pymt (2015/2020) - Next payment due 01/05/2021                                   |

10/24/2019

**Monroe County  
Affordable Rental Housing Loan Portfolio**

| MONTHLY DUE DATE (DEFERRED PRINCIPAL PERMANENT LOAN SUMMARY OF ANNUAL INTEREST-ONLY PAYMENTS) |                             |                  |             |      |      |                |                      |   |
|---|-----------------------------|------------------|-------------|------|------|----------------|----------------------|---|
| (Page 3 - Continued)<br>Rental Project  | Developer/Owner             | Date Loan Issued | Loan Amount | Term | Rate | Annual Payment | Date of Last Payment | Annual Interest-Only Payment Due Date / Comments  |
| Monarch Senior Living-Half Rd. (Webster)  | CDS                         | 01/04/2012       | \$100,000   | 30   | 1%   | \$1,000        | 4/13/2020            | Interest-Only Payments Due: <u>Dec. 1<sup>st</sup></u> (2014) <b>CURRENT</b> - Next payment due 12/16/2021                |
| Monarch Senior Living-Hard Rd. (Webster)  | CDS                         | 1/1/2015         | \$200,000   | 30   | 1%   | \$2,000        | 4/20/2020            | Interest-Only Payments Due: <u>Dec. 1<sup>st</sup></u> (2015) <b>CURRENT</b> - Next payment due 12/16/2021                |
| Westside Drive, (Chill)   | Heritage Christian Services | 11/5/2010        | \$100,000   | 30   | 1%   | \$1,000        | 1/10/2020            | Interest-Only Payments Due: <u>Dec. 1<sup>st</sup></u> (2014) <b>CURRENT</b> - Next payment due 11/27/2020                |
| Gardens @ Town Center, (Greece)   | Home Leasing LLC            | 12/1/2015        | \$200,000   | 30   | 1%   | \$2,000        | 12/1/2016            | Interest-Only Payments Due: <u>Dec. 1<sup>st</sup></u> (2015) <b>Insufficient Cash Flow</b> - Next payment due 12/16/2020 |

10/24/2019

**Monroe County  
Affordable Rental Housing Loan Portfolio**

|  |                                    |            |           |    |    |         |            |   |
|--|------------------------------------|------------|-----------|----|----|---------|------------|---|
| Long Pond Senior Housing                             | Rochester Cornerstone Group        | 12/1/2015  | \$200,000 | 30 | 1% | \$2,000 | 12/16/2019 | Interest-Only Payments Due: <u>Dec. 1<sup>st</sup></u> (2015) <b>CURRENT</b> - Next payment due 12/2/2020   |
| Selden Square II Apts. 125 Susset Center Ln. (Clyde) | Rural Housing Opportunities, Corp. | 12/24/2002 | \$520,000 | 30 | 1% | \$5,200 | 11/27/2019 | 1 <sup>st</sup> Annual Interest Payment Begins in (2008) Payments Begin in "Year 4", 1 <sup>st</sup> Due on <u>12/21/08</u> Next payment due 12/27/2020 |
| Granard Commons II                                   | Pathstone                          | 2/28/2017  | 200,000   | 30 | 1% | \$2,000 | 03/16/2020 | Interest-Only Payment - <b>CURRENT</b> - Next payment due 3/20/2021   |

10/24/2019



# Rental Housing

| Project Name                 | Developer              | Total Units | HOME Units | Affordability Period | Date     | Notes   |
|------------------------------|------------------------|-------------|------------|----------------------|----------|---|
| ADA Ridge I                  | PathStone              | 49          | 49         | 30 Yrs               | 10/2/20  | 10 Files Reviewed electronically and no units inspected because of COVID resurgence precautions. Reviewed previous inspections files. File review indicates compliance                      |
| ADA Ridge II                 | PathStone              | 45          | 11         | 50 Yrs               | 10/2/20  | 5 Files Reviewed electronically and no units inspected because of COVID resurgence precautions. Reviewed previous inspection files. File review indicates compliance                        |
| Arwood                       | Providence             | 33          | 33         | 40 Yrs               | 9/10/20  | 7 files reviewed and 7 units inspected. All units leased at time of monitoring. Minor repairs required (property management completed)  |
| Briarwood Place              | PathStone              | 32          | 32         | 20 Yrs               | 10/15/20 | COVID - Desk Review of six (6) files revealed compliance. A letter was mailed on 12/4/2020  |
| Canal Place                  | PathStone              | 40          | 40         | 30 Yrs               | 10/15/20 | COVID - Desk review of eight (8) files revealed compliance. A letter was mailed on 1/4/2021   |
| CDS Lonesome Road            | CDS                    | 6           | 6          | 20 Yrs               | 11/16/20 | COVID - Desk review of five (5) files revealed compliance. A letter was mailed on 11/25/2020  |
| CDS Monarch I, Hand Rd       | CDS                    | 50          | 11         | 30 Yrs               | 8/31/21  | Inspected 6 randomly selected tenant files, and inspected 6 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                                     |
| CDS Monarch II, Hand Rd      | CDS                    | 96          | 11         | 30 Yrs               | 9/11/19  | Triannual Review  |
| CDS Monarch, Holt Road       | CDS                    | 45          | 25         | 30 Yrs               | 9/11/19  | Triannual Review.   |
| CDS Turk Hill                | CDS                    | 6           | 6          | 20 Yrs               | 11/16/20 | COVID - Desk review of five (5) files revealed compliance. A letter was mailed on 11/25/2020  |
| Cobblestone Place            | Conifer                | 60          | 60         | 30 Yrs               | 8/24/21  | Inspected 6 randomly selected tenant files, and inspected 6 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                                     |
| Cresand Commons I (Elmgrove) | PathStone              | 48          | 48         | 30 Yrs               | 8/19/21  | Inspected 10 randomly selected tenant files, and inspected 10 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. All deficiencies were corrected.  |
| Cresand Commons II           | Pathstone              | 60          | 60         | 30 Yrs               | 8/19/21  | Inspected 5 randomly selected tenant files, and inspected 5 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. All deficiencies were corrected.    |
| Crosman                      | Baldwin RE             | 21          | 21         | 20 Yrs               | 7/20/21  | Inspected 6 randomly selected tenant files, and inspected 6 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                                     |
| Durand Senior Living         | Providence             | 70          | 11         | 30 Yrs               | 8/5/19   | Triannual Review  |
| Elliott's Landing            | PathStone              | 14          | 14         | 30 Yrs               | 8/13/21  | Inspected 6 randomly selected tenant files, and inspected 6 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                                     |
| Fairport Apartments (FAI)    | F/P St. Liv Coun       | 104         | 8          | 50 Yrs               | 9/13/19  | Triannual Review  |
| Frances I Apartments         | Rochester Corner       | 56          | 11         | 30 Yrs               | 10/20/19 | Triannual Review  |
| Frances II Apartments        | Rochester Corner       | 48          | 11         | 31 Yrs               | 9/20/20  | Initial Inspection. No problems found.  |
| Gardens at Town Center       | Home Leasing           | 176         | 8          | 30 Yrs               | 8/9/21   | Inspected 8 randomly selected tenant files, and inspected 8 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                                     |
| Goose Landing I              | Home Leasing c/o ULRDC | 20          | 20         | 40 Yrs               | 11/20/20 | Inspected 5 randomly selected tenant files, and inspected the outer perimeter. COVID. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                       |
| Goose Landing II             | Home Leasing c/o ULRDC | 20          | 19         | 30 Yrs               | 11/20/20 | Inspected 5 randomly selected tenant files, and inspected the outer perimeter. COVID. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                       |
| HCS Westside Drive           | Heritage C S           | 12          | 11         | 30 Yrs               | 9/1/21   | Desk review of all the tenant files, and inspected the site location for the Single Room Occupancy site (2 sites). Violence Against Women forms were up-to-date. Property in good standard. |
| HCS Winton Road              | Heritage C S           | 6           | 6          | 20 Yrs               | 9/1/21   | Desk review of all the tenant files, and inspected the site location for the Single Room Occupancy site. Violence Against Women forms were up-to-date. Property in good standard.           |
| Heritage Gardens             | Home Leasing           | 83          | 11         | 40 Yrs               | 9/5/19   | Triannual inspection  |
| Hilton Park                  | Unity                  | 69          | 28         | 30 Yrs               | 10/27/20 | Inspected 6 randomly selected tenant files, and outdoor perimeters. COVID. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                                  |
| Hobie Creek                  | PathStone              | 64          | 64         | 30 Yrs               | 10/20/20 | 13 Files Reviewed electronically and no units inspected because of COVID resurgence precautions. Reviewed previous inspections files. File review indicates compliance                      |

|                                    |                    |     |     |        |          |  |
|------------------------------------|--------------------|-----|-----|--------|----------|--|
| Hope Gardens                       | Pathstone          | 10  | 10  | 25 Yrs | 8/18/21  | Inspected 5 randomly selected tenant files by desk review, and inspected 6 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date.                           |
| Jefferson Park                     | Conifer            | 69  | 6   | 30 Yrs | 9/10/19  | Triannual inspection   |
| Kathlyn Gardens                    | YWCA               | 12  | 11  | 30 Yrs | 8/25/21  | 5 Files Reviewed electronically. File review indicates compliance. Units inspected and no deficiencies were found.   |
| LAI Buffalo Road                   | Lifetime Assist    | 10  | 10  | 20 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI Hamlin (E. Fork Lake Road)     | Lifetime Assist    | 10  | 10  | 15 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI Holley Street                  | Lifetime Assist    | 3   | 4   | 15 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI Island Cottage                 | Lifetime Assist    | 7   | 7   | 20 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI North Greece                   | Lifetime Assist    | 8   | 8   | 20 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI South Avenue                   | Lifetime Assist    | 8   | 10  | 20 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI Weiland Woods                  | Lifetime Assist    | 6   | 11  | 20 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| LAI Windsor Woods (Hables/Nowicki) | Lifetime Assist    | 6   | 6   | 40 Yrs | 10/29/20 | On-site Desk Review of SRO's tenant files. All in compliance. COVID - no physical inspections  |
| Long Pond Senior                   | Rochester Corner   | 54  | 11  | 30 Yrs | 8/25/21  | Inspected 6 randomly selected tenant files, and inspected 6 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. No deficiencies were found               |
| Northfield Enriched Housing        | North Fld Hous Dev | 69  | 14  | 30 Yrs | 11/15/19 | Triannual Review   |
| Ogden Gardens                      | Home Leasing       | 89  | 28  | 30 Yrs | 9/17/21  | Desk Review. Inspected 6 randomly selected tenant files. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. All files were in order.                                |
| Rockwood Center                    | Providence         | 40  | 20  | 50 Yrs | 7/31/19  | Triannual Review   |
| Seldon Square I                    | PathStone          | 30  | 30  | 30 Yrs | 8/27/21  | Inspected 7 randomly selected tenant files, and inspected 7 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. No deficiencies were found               |
| Seldon Square II                   | PathStone          | 36  | 36  | 30 Yrs | 8/27/21  | Inspected 7 randomly selected tenant files, and inspected 7 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. No deficiencies were found               |
| Seneca Place                       | Conifer            | 40  | 11  | 30 Yrs | 9/10/19  | Triannual Review   |
| St. Andrews                        | Providence         | 12  | 12  | 20 Yrs | 8/1/19   | Triannual Review   |
| St. Salome's                       | Providence         | 45  | 11  | 50 Yrs | 8/5/19   | Triannual Review   |
| Stonewood Village                  | PathStone          | 188 | 168 | 30 Yrs | 11/2/20  | Reviewed 34 random tenant files on site. Outdoor perimeter inspection was done. COVID restrictions. Property found to be in compliance.  |
| Union Meadows II                   | Providence         | 42  | 42  | 50 Yrs | 8/23/21  | Inspected 10 randomly selected tenant files, and inspected 10 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. Deficiencies were found and corrected. |
| Union Meadows I                    | Providence         | 48  | 48  | 20 Yrs | 8/23/21  | Inspected 10 randomly selected tenant files, and inspected 10 HOME units. The Affirmative Marketing Strategy and Tenant Selection Policy were up-to-date. Deficiencies were found and corrected. |
| Union Park                         | Providence         | 50  | 50  | 20 Yrs | 9/20/20  | 10 files reviewed and 10 units inspected. 49 out of 50 units leased at time of monitoring. Minor issues that were addressed by property maintenance  |
| West Town Village                  | Providence         | 59  | 59  | 30 Yrs | 9/20/20  | 12 files reviewed and 12 units inspected. Minor issues that were addressed by property maintenance   |