

Grantee: Tulare County, CA

Grant: B-11-UN-06-0007

January 1, 2013 thru March 31, 2013 Performance Report



Grant Number:
B-11-UN-06-0007

Obligation Date:

Award Date:

Grantee Name:
Tulare County, CA

Contract End Date:
03/16/2014

Review by HUD:
Reviewed and Approved

Grant Amount:
\$2,845,529.00

Grant Status:
Active

QPR Contact:
Sandra M Sabin

Estimated PI/RL Funds:

Total Budget:
\$2,845,529.00

Disasters:

Declaration Number
NSP

Narratives

Summary of Distribution and Uses of NSP Funds:

Areas of greatest need will be determined using data from the HUD Foreclosure Need Website at <http://www.huduser.org/portal/datasets/NSP.html>. In order to comply with the NSP3 requirement that funds be expended in the highest needs census tracts and block groups, the County of Tulare will not spend any NSP3 funds in areas with a needs score of less than 17. Using the minimum need score of 17 will allow for funds to be directed to those areas with the highest percentage of home foreclosures, highest percentage of homes financed by subprime mortgage related loans and likely to face a significant rise in the rate of home foreclosures.

How Fund Use Addresses Market Conditions:

NSP3 requires funds to be focused on geographically contiguous areas in such a way that the selected target area experiences the highest impact possible. Additionally, HUD requires that the need score of the targeted area be at least 17. Targeted neighborhoods must be predominantly comprised of low-, moderate-, and middle-income (LMMI) households, which is defined as households earning at or below 120% of Area Median Income (AMI) annually. The County of Tulare will use a minimum of 25% of its NSP3 allocation for permanent housing for households with incomes that do not exceed 50% of AMI.

Ensuring Continued Affordability:

The following Affordability Covenants will be placed on all NSP3 assisted properties to ensure continued affordability for all units assisted:
45 years - Ownership Units
55 years - Rental Units

Definition of Blighted Structure:

A structure is blighted when it exhibits objectively determinable signs of deterioration sufficient to constitute a threat to human health, safety, and public welfare.

Definition of Affordable Rents:

Affordable Rents

The County of Tulare shall define "affordable rents" as those that conform to HOME Program standards for Affordable Housing at 24 CFR 92.252 (rental housing) and 24 CFR 92.254 (homeownership).

For Rental Housing, the following costs shall be included in the Affordable Housing Cost calculation:

1. Rent
2. Reasonable Utility Allowance

Rental Housing Affordable Housing Cost Calculation

Low Income: 30% x 50% of AMI : 12

Moderate Income: 30% x 80% of AMI : 12

For Homeownership, the following costs shall be included in the Affordable Housing Cost calculation:



1. Principal and Interest payment
2. Property Taxes
3. Insurance
4. Homeowners' Association Dues
5. Property Maintenance
6. Utility Allowance

Ownership Affordable Housing Cost Calculation
 Low Income: 30% x 50% of AMI : 12
 Moderate Income: 30% of 80% of AMI : 12

Affordable Housing Cost & Affordable Housing Cost includes all housing costs described above under Rental Housing and Homeownership Costs

Maximum Affordable Housing Cost Low Income Moderate Income
 (Based on actual BR size, or 0-50% AMI 51-80% AMI
 30% of family's monthly income)

Definition of Affordable Rents:

Monthly gross income) (Monthly) (Monthly)

Studio	\$493	\$778
1-Bedroom	\$528	\$845
2-Bedroom	\$633	\$1,013
3-Bedroom	\$732	\$1,185
4-Bedroom	\$817	\$1,307

Housing Rehabilitation/New Construction Standards:

The County of Tulare will adopt HOME Program property standards at 24 CFR 92.251 that require local written rehabilitation standards. Such written standards include methods and materials to be used during housing rehabilitation and conform to local building codes and the State of California Building Code. The County will incorporate green building and energy efficiency improvements in all NSP activities.

REHABILITATION & NEW CONSTRUCTION STANDARDS

- A. All new housing units constructed must be in compliance with state and local codes and ordinances.
- B. Energy Efficient Green Building Features

The Project construction will include as many Energy Efficient Green Building Features as possible and practical. Following is a listing of suggested features.

1. Use plant and tree species that require low water use in sufficient quantities and install an irrigation system using only low-flow drip, bubblers, or low-flow sprinklers.
2. Use engineered lumber.
 - a. Beams and headers.
 - b. Wood I-Joists or web trusses for floors and ceilings.
3. Use Oriented Strand Board (OSB).
 - a. Floor, wall and roof sheathing.
4. Provide effective air sealing.
 - a. Seal sole plates.
 - b. Seal exterior penetrations at plumbing, electrical and other penetrations.
 - c. Seal top plate penetrations at plumbing, electrical, cable, and other penetrations.
 - d. Weather-strip doors and attic access openings.
 - e. Seal penetrations in interior equipment closets and rooms.
 - f. Seal around bathtub drain penetrations in raised floors.
5. Install and flash windows in compliance with window installation protocols.
6. Exterior Doors
 - a. Insulated or solid core.
 - b. Flush, paint or stain grade shall be metal clad or have hardwood faces.
 - c. Factory primed on six sides with a one-year warranty.
7. Select durable non-combustible roofing materials which carry a three-year contractor installation guarantee.
8. Install Energy Star® ceiling fans in living areas and all bedrooms; install a whole house fan with insulated louvers; or install an economizer.
9. Install Energy Star® appliances in each unit, including but not limited to;
 - a. Stoves
 - b. Refrigerators
10. Install gas storage water heater with an Energy Factor (EF) of 0.62 or greater and a capacity of at least 30 gallons for one- and two-bedroom units and 40 gallons for three-bedroom units or larger.
11. Use water saving fixtures or flow restrictors.
 - a. Kitchen and Service Areas < 2 gallons per minute (gpm).
 - b. Bathroom Sinks <= 1.5 gpm.
 - c. Showers and Bathtubs <= 2.5 gpm.



12. Use Low-Volatile Organic Compound (VOC) paint and stain.

a. Flat interior wall/ceiling paints & stains <50gpl VOCs.

b. Non-flat wall/ceiling paints & stains <150 gpl VOCs.

13. Floor Coverings

a. Light and medium traffic areas shall have vinyl or linoleum at least 3/32" in thickness.

b. Heavy traffic areas shall have vinyl or linoleum at least 1/8" in thickness.

c. Carpet shall comply with Department of Housing and Urban Development (HUD)/Farmers Home Administration (FHA) UM 44C, or alternatively, cork, bamboo, linoleum, or hardwood floors shall be provided in all other floors

Housing Rehabilitation/New Construction Standards:

or areas.

C. Universal Design Standards

The Project construction will also as many Universal Design Standards as possible and practical. Following is a list of recommended standards:

1. Provide at least one no-step entrance with beveled threshold. This may be at the front, side or back of units.
2. Make doorways throughout the unit at least 32 inches wide and hallways at least 36 inches clear width.
3. Reinforce wall around the toilet, bathtub and shower stall in order that grab bars may be added at a later time, if needed.
4. Install switches and electrical controls no higher than 48 inches and electrical plugs no lower than 15 inches above the floor.
5. Install lever handles on all doors and plumbing fixtures.

Vicinity Hiring:

The County of Tulare requires that Corporation for Better Housing (CBH) will hire contractors and residents from the local vicinity to carry out any aspect of this project to the maximum extent feasible. Additionally, CBH will implement a Section 3 Plan that is directed at increasing the utilization of lower income residents as employees and small businesses as subcontractors and suppliers. This plan will seek assistance of local officials in determining exact boundaries of the applicable project area; attempt to recruit from the project area through local advertising, local and site specific job postings and community service organizations; maintain documentation of Section 3 efforts; include Section 3 clauses in subcontracts and bidding documents.

Procedures for Preferences for Affordable Rental Dev.:

When selecting its NSP3 target area, the County of Tulare gave preference to the construction of a 72-unit multifamily rental project located in the community of Ivanhoe, entitled the Ivanhoe Family Apartments. The County of Tulare has partnered with Corporation for Better Housing (CBH) for the construction of this project. The Ivanhoe Family Apartments is a new construction project that will have 5 two-story garden style walk-up buildings, housing 72 rental units reserved for families with incomes ranging from 30% to 50% of the Area Median Income (AMI). There will be 16 one-bedroom units, 32 two-bedroom units, and 24 three-bedroom units. At full capacity, the apartments will house 72 families and up to 376 people. The proposed site is less than one mile from an elementary school, shopping, employment and transportation. A grocery store is within 100 yards of the project. The project developer has committed to hiring targeted income group individuals to manage and oversee day-to-day operation and maintenance of the complex. CBH will establish a waiting list of potential tenants before construction is complete. They will ensure that the tenants are income-qualified and meet the requirements of tenancy. Preference will be given to those tenants who meet qualifications on a first-come-first-served basis.

Ivanhoe is an extremely blighted and economically disadvantaged community that has a severe lack of diversified affordable housing. There have been no new apartments built in Ivanhoe since 1992 and the rate of residential overcrowding is 38.7%. According to the County's Housing Element, 26% of families in Ivanhoe are below the poverty level, compared to 19% countywide. The Ivanhoe Family Apartments will address local market conditions by providing 72 new affordable rental housing units for low income families earning 50% of Area Median Income (AMI) and below; therefore providing quality housing at a rental rate commensurate with the tenant's income. This will help alleviate overcrowding conditions and spur the local economy with tenants having more discretionary income to spend with local businesses. The new development will eliminate blight and overcrowding conditions and help to stabilize the housing market. In addition, the development will provide local jobs.

Grantee Contact Information:

County of Tulare
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 Visalia, CA 93277
 (559) 624-7070

Overall	This Report Period	To Date
Total Projected Budget from All Sources	N/A	\$14,433,670.00
Total Budget	\$0.00	\$2,845,529.00
Total Obligated	\$0.00	\$2,845,529.00
Total Funds Drawdown	\$2,643,597.00	\$2,643,597.00
Program Funds Drawdown	\$2,643,597.00	\$2,643,597.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$25,950.00	\$2,720,383.00
Match Contributed	\$0.00	\$0.00

Progress Toward Required Numeric Targets

Requirement	Required	To Date
Overall Benefit Percentage (Projected)		0.00%
Overall Benefit Percentage (Actual)		0.00%
Minimum Non-Federal Match	\$0.00	\$0.00
Limit on Public Services	\$426,829.35	\$0.00
Limit on Admin/Planning	\$284,552.90	\$82,621.00
Limit on State Admin	\$0.00	\$82,621.00

Progress Toward Activity Type Targets

Activity Type	Target	Actual
Administration	\$284,552.90	\$284,553.00

Progress Toward National Objective Targets

National Objective	Target	Actual
NSP Only - LH - 25% Set-Aside	\$711,382.25	\$2,560,976.00

Overall Progress Narrative:

Construction of the 76-Unit Ivanhoe Family Apartments was completed on January 15, 2013 with the Notice of Completion recorded on January 16, 2013. Certificate of Occupancy was issued on January 10, 2013 and a total of 14 units have been rented as of March 31, 2013.

Project Summary

Project #, Project Title	This Report Period	To Date	
	Program Funds Drawdown	Project Funds Budgeted	Program Funds Drawdown



001, New Construction	\$2,560,976.00	\$2,560,976.00	\$2,560,976.00
002, Administration	\$82,621.00	\$284,553.00	\$82,621.00



Activities

Grantee Activity Number:	1
Activity Title:	New Construction, Multifamily Rental Housing

Activity Category:

Construction of new housing

Activity Status:

Planned

Project Number:

001

Project Title:

New Construction

Projected Start Date:

07/01/2011

Projected End Date:

07/31/2013

Benefit Type:

Direct (HouseHold)

Completed Activity Actual End Date:

National Objective:

NSP Only - LH - 25% Set-Aside

Responsible Organization:

County of Tulare

Overall	Jan 1 thru Mar 31, 2013	To Date
Total Projected Budget from All Sources	N/A	\$2,560,976.00
Total Budget	\$0.00	\$2,560,976.00
Total Obligated	\$0.00	\$2,560,976.00
Total Funds Drawdown	\$2,560,976.00	\$2,560,976.00
Program Funds Drawdown	\$2,560,976.00	\$2,560,976.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$2,560,976.00
County of Tulare	\$0.00	\$2,560,976.00
Match Contributed	\$0.00	\$0.00

Activity Description:

The Ivanhoe Family Apartments will address local market conditions by providing 72 new affordable rental housing units for low income families earning 50% of AMI and below; therefore providing quality housing at a rental rate commensurate with the tenant's income. This will help alleviate overcrowding conditions and spur the local economy with tenants having more discretionary income to spend with local businesses. The new development will eliminate blight and overcrowding conditions and help to stabilize the housing market. In addition, the development will provide local jobs.

Location Description:

The proposed site is less than one mile from an elementary school, shopping, employment and transportation. A grocery store is within 100 yards of the project.

Activity Progress Narrative:

The Development is a Green Point Rated Community and incorporates new technologies to exceed Title 24 by at least 15%. This was achieved by utilizing high r-value insulation, low-e glazed windows, a high efficiency boiler system, water conservation systems, and Energy Star rated appliances. A draw request for the activity funds was processed during this quarter. However, these funds were expended between June and August 2012, with an invoice paid to the developer in October 2012. The County entered a draw request into DRGR for these funds in November 2012 but due to a glitch with the County's set up in LOCCS, the draw was not approved and processed until the current quarter. Project funds in the amount of \$2,643,597 which were allocated to the Ivanhoe Family Apartments have been fully expended.



Accomplishments Performance Measures

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
#Low flow toilets	114		114/72	
#Low flow showerheads	108		108/72	
# ELI Households (0-30% AMI)	6		6/0	

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Housing Units	76		76/1	
# of Multifamily Units	76		76/1	

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	14	0	14	14/72	0/0	14/72	100.00
# Renter Households	14	0	14	14/72	0/0	14/72	100.00

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
California 4% Tax Credit Allocation	\$4,114,070.00
Deferred Developer Fee	\$75,700.00
HOME Investment Partnerships Program (HOME)	\$5,000,000.00
Neighborhood Stabilization Program 1 (NSP1)	\$854,000.00
Permanent Mortgage Financing	\$1,394,371.00
Tulare County Redevelopment Agency Funds	\$150,000.00
Total Other Funding Sources	\$0.00



Grantee Activity Number: 2
Activity Title: Administration

Activity Category:

Administration

Activity Status:

Under Way

Project Number:

002

Project Title:

Administration

Projected Start Date:

03/16/2011

Projected End Date:

07/31/2013

Benefit Type:

()

Completed Activity Actual End Date:

National Objective:

N/A

Responsible Organization:

County of Tulare

Overall	Jan 1 thru Mar 31, 2013	To Date
Total Projected Budget from All Sources	N/A	\$284,553.00
Total Budget	\$0.00	\$284,553.00
Total Obligated	\$0.00	\$284,553.00
Total Funds Drawdown	\$82,621.00	\$82,621.00
Program Funds Drawdown	\$82,621.00	\$82,621.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$25,950.00	\$159,407.00
County of Tulare	\$25,950.00	\$159,407.00
Match Contributed	\$0.00	\$0.00

Activity Description:

NSP3 Program Administration funds will be used to pay reasonable and necessary expenses for implementing the NSP3 Program. This includes but is not limited to County staff salaries, office supplies, and training.

Location Description:

N/A

Activity Progress Narrative:

The submitted admin draw request for \$82,621 covered staff time from December 2010 through August 2012. This amount covered staff time for the implementation of the grant, action plan, NSP clinics, roundtables, and webinars, as well as review of loan documents and general oversight of the implementation of the Ivanhoe Family Apartments. The original draw request was submitted to DRGR in November 2012 but due to a glitch with the County's set up in LOCCS, the County had to re-submit the draw several times. The final submittal was approved and completed during this quarter. The admin funds reported as expended during this quarter acutally cover the period from September 2012 through March 2013. The County will submit a draw request before the end of the fiscal year. The admin funds were used for continued oversight and management of the project.

Accomplishments Performance Measures

No Accomplishments Performance Measures found.



Beneficiaries Performance Measures
No Beneficiaries Performance Measures found.

Activity Locations
No Activity Locations found.

Other Funding Sources Budgeted - Detail
No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

