



September 30, 2014

Michael Flores, Community Planning and Development Representative  
U.S. Department of Housing and Urban Development  
1 N. Central Ave, Suite 600  
Phoenix, AZ 85004

Dear Mr. Flores,

Enclosed is an original and 2 copies of the Town of Gilbert's Consolidated Annual Performance and Evaluation Report. This report details Gilbert's Community Development Block Grant, HOME Investment Partnership, and related activities through June 30, 2014.

Please contact Jessica Fierro at 480-503-6893 if you have any questions or require additional information regarding this report or Gilbert's HUD funded activities.

Sincerely,

A handwritten signature in blue ink, appearing to read "Patrick Banger".

Patrick Banger  
Town Manager

Enclosures







# Gilbert

## 2013-2014

# Consolidated Annual Performance and Evaluation Report (CAPER)

September 30, 2014

Additional information related to this report is available upon request at:

Neighborhood & Outreach Services  
Town Of Gilbert  
90 E. Civic Center Dr.  
Gilbert Rd. 85296

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TOWN OF GILBERT, ARIZONA  
CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT  
FISCAL YEAR 2013-14

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# Fourth Program Year CAPER

The CPMP Fourth Consolidated Annual Performance and Evaluation Report includes Narrative Responses to CAPER questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations. The Executive Summary narratives are optional.

The grantee must submit an updated Financial Summary Report (PR26).

## GENERAL

### Executive Summary

Program Year 4 CAPER Executive Summary response:

Gilbert became a Community Development Block Grant, or CDBG entitlement community at the beginning of fiscal year (FY) 1997-98. Gilbert has received HOME Investment Partnership funds as part of the Maricopa HOME Consortium since FY1998-99. This report covers Gilbert's activities between July 1, 2013 and June 30, 2014. These activities were financed with CDBG, HOME Investment Partnership Funds, Gilbert general funds and other resources identified by subrecipients including state, local and private funds. Housing activities reported here are also part of the Maricopa Consortium annual plan and CAPER annual report.

Gilbert received the following allocations from the U.S. Department of Housing and Urban Development in 2013-14:

|  |           |
|--|-----------|
| Community Development Block Grant (CDBG) | \$799,911 |
| HOME Investment Partnership Funds (HOME) | \$184,251 |

The Town of Gilbert's Consolidated Annual Performance and Evaluation Report (CAPER) provides a summary of activities and expenditures accomplished with CDBG and HOME funds for fiscal year 2013-2014. The FY 2013-14 CAPER is an evaluation of the fourth year of the Town's Five Year Consolidated Plan (2010-2015). Also included in this report are other funds expended to help achieve the Town of Gilbert's goals identified in the Five Year Consolidated Plan.

Gilbert's CDBG and HOME program expenditures were combined with other local and private resources including Gilbert general funds in 2013-14. Gilbert spent \$1,028,187 in CDBG funds on housing and community development activities and \$305,000 in local funds on homeless, special needs, youth, and other social services during 2013-14.

Through the Maricopa HOME Consortium, Gilbert allocated its FY 2013-14 HOME Allocation of \$184,251 to the City of Chandler for Tenant-based Rental Assistance. The Town did not receive any applications for use of its HOME funds and did not have an internal program available to expend funds. The HOME Consortium voted to reallocate Gilbert's HOME funds to another jurisdiction to comply with HOME expenditure timelines.

The following table indicates the total FY 2013/14 CDBG and HOME allocations, carry over balances, reallocations, expenditures, and remaining balances as of June 30, 2014.

| FY 2013-14 CDBG                                       |                     |                                  | Total Allocation: \$799,911 |                                 |                       |                   |
|---|---------------------|----------------------------------|-----------------------------|---------------------------------|-----------------------|-------------------|
|   | FY 13-14 Allocation | Prior Year(s) Project Allocation | Total Project Budget        | Prior Year Project Expenditures | FY 13-14 Expenditures | Balance Remaining |
| A New Leaf, EVMC Renovations                          | \$0                 | \$18,000                         | \$18,000                    | \$0                             | \$18,000              | \$0               |
| A New Leaf, La Mesita New Construction                | \$0                 | \$25,000                         | \$25,000                    | \$0                             | \$0                   | \$25,000          |
| CASS Facility Improvements                            | \$50,000            | \$0                              | \$50,000                    | \$0                             | \$0                   | \$50,000          |
| Home Rehab & Emergency Repairs                        | \$250,000           | \$16,182                         | \$266,182                   | \$0                             | \$266,182             | \$0               |
| Family Promise Homeless Shelter Facility Improvements | \$70,593            | \$0                              | \$70,593                    | \$0                             | \$69,116              | \$1,477           |
| Heritage District Pedestrian Safety Project           | \$87,416            | \$489,516                        | \$576,932                   | \$0                             | \$510,908             | \$0               |
| Heritage District Sewer Assessment                    | \$79,835            | \$18,675                         | \$98,510                    | \$0                             | \$20,770              | \$77,740          |
| Voluntary Demolition Program                          | \$0                 | \$10,500                         | \$10,500                    | \$0                             | \$10,486              | \$14              |
| Public services – Gilbert Senior Center               | \$112,315           | \$0                              | \$112,315                   | \$37,296                        | \$149,611             | \$0               |
| Administration  | \$149,752           | \$0                              | \$149,752                   | \$0                             | \$86,310              | \$63,442          |
| <b>Total</b>  | <b>\$799,911</b>    | <b>\$577,873</b>                 | <b>\$1,377,784</b>          | <b>\$37,296</b>                 | <b>\$1,131,383</b>    | <b>\$217,673</b>  |
| FY 2012-13 HOME                                       |                     |                                  | Total Allocation: \$184,251 |                                 |                       |                   |
|   | FY 13-14 Allocation | Prior Year(s) Project Allocation | Total Project Budget        | Prior Year Project Expenditures | FY 13-14 Expenditures | Balance Remaining |
| City of Chandler TBRA                                 | \$184,251           | \$0                              | \$184,251                   | \$0                             | \$0                   | \$0               |
| <b>Total</b>  | <b>\$184,251</b>    | <b>\$0</b>                       | <b>\$184,251</b>            | <b>\$0</b>                      | <b>\$0</b>            | <b>\$0</b>        |

**Fiscal year 2013-14 accomplishments are:**

**Social Services- Homeless, Senior, Disabled, Youth and Special Needs**

Gilbert provided \$112,315 in CDBG funds and \$305,000 in local general funds to local and regional social service providers for youth, homeless, senior and disabled, prevention and intervention, and other social services. Accomplishments include:

Homeless Housing and Support Services:

- 39 homeless Gilbert individuals received emergency and transitional housing, basic needs, and support services to assist them with stabilization and provide the next step towards self-sufficiency. A total of \$25,000 in funds were expended for these efforts;

CDBG Public Services and Non-homeless Special Needs:

- A total of 1,316 elderly, disabled and homebound Gilbert seniors received congregate and home delivered meals, senior activities and disability services, transportation, and well checks expending \$112,315 in CDBG and \$21,000 in Gilbert general funds. These services help Gilbert seniors maintain their independent living and increase their quality of life;

Anti-poverty Services

- 2,278 Gilbert residents experiencing a crisis received emergency financial assistance for rent, mortgage and utilities expending \$130,000 in general funds. Without this limited emergency assistance, families would be faced with utility shut-offs, additional deposits and possibly eviction and homelessness;

Youth Services (Prevention/Intervention)

- 2,089 Gilbert youth participated in a variety of programming designed to prevent juvenile delinquency and to provide intervention techniques for at-risk youth. Services included after school structured activities, mentoring, education and involvement, rewards for good behavior and character and financial literacy. These services expended a total of \$126,000 in general funds.

**Public Facilities/Infrastructure**

In FY 2013-14, Gilbert participated in a variety of regional and local capital improvement projects expending a total of \$792,266 in 13/14 CDBG funds.

Gilbert contributed CDBG funds to two (2) new capital projects for homeless shelter assistance and expended funds on a capital project from FY 2012-13. A total of \$18,000 was expended at A New Leaf, East Valley Men's Center to assist with rehabilitation and expansion of their single adult men's emergency shelter. In addition, a total of \$69,116 in CDBG funds were expended at Family Promise Homeless Shelter in Scottsdale to assist with overall facility lighting upgrades.

Gilbert participates in combating regional homelessness by participating in capital projects to regional homeless facility providers, thereby continuing to support much needed services for homeless persons in the east valley.

The Town completed the Downtown Heritage District Pedestrian Safety project in FY 13/14. This was a large project that began in FY 12/13 utilizing CDBG funds to address ADA

accessible sidewalks, curb ramps and lighted crossings in the Downtown Heritage District of Gilbert. Two flashing beacons were installed at two intersections to allow for additional crossing areas for pedestrians to safely get from one side of downtown to the other. The Heritage District's first parking garage is almost complete as well as new retail and restaurant facilities. The new pedestrian safety features will reduce hazards for residents as pedestrian traffic continues to increase as new amenities are completed in the area. A total of \$510,908 in CDBG funds was expended on the project.

Finally, the Town allocated CDBG funds to complete a Heritage District Sewer Assessment. It was found that many original sewer lines still exist in this area and was installed in the early 1970's. Due to age and the additional usage due to business expansion, it was determined that an overall assessment of the sewer be completed to ensure that residents residing in this low-income area are provided appropriate and necessary sewer services. The assessment will be complete in FY 14/15.

### **Housing**

Gilbert continued to provide services to exceed the fourth year housing goals of the Consolidated Plan. Housing services include the Gilbert Emergency and Minor Home Repair Program funded with CDBG funds.

#### **Accomplishments included:**

- The Emergency and Minor Home Repair Program assisted a program record number of residents to alleviate health and safety hazards in their homes. A total of 78 low and moderate income households received emergency and minor home repairs expending \$266,182 in CDBG funds. These families are now safe from hazardous home conditions that without assistance would still be present and potentially gotten worse.

The Financial Summary and complete CAPER Report documenting the CDBG funds available and expended in Gilbert through June 30, 2014 are available on Gilbert's webpage at [www.gilbertaz.gov/communitydevelopment](http://www.gilbertaz.gov/communitydevelopment). Please contact Maricopa County Community Development at 602-372-1524 for detailed financial reports on Gilbert's HOME funded housing activities.



## General Questions

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

Program Year 4 CAPER General Questions response:

### One Year Assessment

Programs and projects during FY 13/14 were targeted on a community wide or regional basis when applicable to provide the largest impact to those in need in relation to the activities and goals to be achieved during the year. Below is an assessment of the total accomplishments in relation to the goals set forth under each activity category:

Public Service Goal: Improve services for low and moderate income persons.

The Town of Gilbert funded one program allocating 15% of CDBG public service dollars to Chandler Christian Community Center to administer the Gilbert Senior Nutrition Program. A total of \$112,315 in CDBG funds were utilized to provide 1,316 elderly, frail, disabled, and/or homebound Gilbert residents with congregate and home delivered meals. In addition, social and recreational activities were provided to seniors attending the Gilbert Senior Center to promote healthy living and independence.

The Town also allocated \$297,000 in Gilbert general funds and \$8,000 in voluntary donations to public service activities providing services for homeless, youth, senior, disabled, and other populations. Services were provided in various locations in Gilbert and throughout the metro area. All services were available to eligible residents throughout Gilbert.

Public services activities included:

- Emergency and transitional housing for the homeless
- Support for regional homeless assistance providers

- Basic needs assistance including emergency financial assistance, food boxes, and utility assistance
- Senior and disabled supportive and educational services
- Intervention and prevention activities for at-risk youth

Owner Occupied Housing Goal: Improve the quality of owner occupied housing

Emergency home repair and housing rehabilitation programs helped to maintain existing affordable housing for low and moderate income families and address issues of health and safety concerns as well as barrier removal for the disabled. The Gilbert Emergency and Minor Repair program is available to eligible residents in all areas of Gilbert. The program provided assistance to 87 Gilbert homeowners and expended \$266,182 in FY 12/13 and 13/14 CDBG funds. By assisting Gilbert homeowners with emergency repairs, the program allows the residents to utilize their funds in other ways to stabilize their crisis and help to maintain their stability. In addition, keeping homeowners in their homes helps to maintain stability in the neighborhoods and reduces the amount of vacant and/or foreclosures within the community. The Town wants to keep residents in their homes rather than using their limited resources for emergency repairs which may in turn cause them to fall behind on their mortgage payments or lead to foreclosure. The Emergency and Minor Home Repair program served a record number of households this fiscal year, increasing the number served by 61 percent over the previous year with less funds expended.

Affordable Housing Goal: Increase the number of quality affordable housing units for low and moderate income households

Gilbert did not allocate its FY 13/14 HOME funds in the amount of \$184,251 as we did not receive any applications during our annual funding process. The Town will be analyzing use of HOME funds for the future determined by the recommendations of the Human Services Needs Assessment. It is anticipated that Town Council will approve housing priorities in December 2014. At which time, the Town will conduct a separate Request for Proposals and allocate its FY 13/14 and FY 14/15 HOME fund allocations.

There are currently ten (10) affordable housing units in Gilbert which are operated by Affordable Rental Movement of Save the Family. There are also three Low Income Tax Credit (LIHTC) rental apartment developments that continue to provide additional affordable housing for low and moderate income families in Gilbert. San Clemente opened in South Gilbert in late 2005 and provides 303 one, two and three bedroom apartments and town homes with numerous amenities. The Groves in northeast Gilbert offers one, two, or three bedroom apartments for individuals and families. Page Commons senior housing development opened in 2005 and provides 100 units of 1 and 2 bedroom units for independent seniors at or below 30%, 50%, or 60% of the median income. Page Commons is located next door to the new Gilbert Senior Center that has several senior programs including congregate and home delivered meals.

Public Facility/Infrastructure Goal: Improve quality and quantity of neighborhood facilities for low-income persons and improve infrastructure in low-income neighborhoods

In FY 2013/14, Gilbert participated in a variety of regional and local capital improvement projects allocating a total of \$287,844 in 13/14 funds and \$587,846 in previous years CDBG funds.

Gilbert contributed CDBG funds to two (2) capital projects for regional homeless shelter assistance. Central Arizona Shelter Services, an emergency homeless shelter in downtown

Phoenix, was awarded \$50,000 for facility improvements. These improvements are also being funded by other city CDBG funds and shows regional support for municipalities supporting homeless services. Family Promise, a Scottsdale homeless facility, was awarded \$70,593 for lighting upgrades at their emergency shelter facility. Family Promise provides emergency shelter to Gilbert families as well as others in the east valley.

Two infrastructure improvement projects within Gilbert were funded and one completed during FY 13/14. The Downtown Heritage District Pedestrian Safety project was completed to enhance pedestrian safety and reduce congestion in surrounding neighborhoods of downtown Gilbert. The Heritage District continuously expands with new businesses, restaurants and events, thereby attracting larger numbers of people driving, walking, biking and parking in the area. There is a lack of parking and adequate sidewalks making it difficult for residents to safely move throughout the downtown area. The increased congestion is also causing parking to spill into the surrounding neighborhoods creating increased hazards for residents. The Pedestrian Safety project installed ADA accessible sidewalks, curb ramps and lighted crossings to provide safe and fluent walking areas, specifically for those with disabilities. Two flashing beacons were installed at two intersections to allow for additional crossing areas for pedestrians to safely get from one side of downtown to the other. The project expended a total \$510,908 in current and previous year CDBG funds.

As a result of findings during construction of several new businesses within the Heritage District, it was determined that a water and sewer needs assessment should be completed for the area. CDBG funded \$98,510 to complete this assessment. It was found that several areas of the downtown area serving residential water and sewer are still original clay piping and not adequate to accommodate new business without impacting current residents in surrounding neighborhoods. Old piping is connected to new infrastructure causing a mismatch and lack of efficiency in providing these services. The assessment will allow the Town to determine the necessary infrastructure needed to sustain these services to residents on a sustainable and efficient basis. The assessment is scheduled for completion at the end of 2014.

| Agency/Program                        | Funding Allocated FY 13/14                           | Expenditures     | Funding Source | HUD Outcome | Persons Assisted |
|---------------------------------------|--|------------------|----------------|-------------|------------------|
| <b>Rental Housing Objectives</b>      |  |                  |                |             |                  |
| ARM of Save the Family                | \$0  | \$0              | HOME           | DH-2        | 0                |
| <b>TOTAL</b>                          | <b>\$0</b>   | <b>\$0</b>       |                |             | <b>0</b>         |
| <b>Owner Housing Objectives</b>       |  |                  |                |             |                  |
| Emergency Home Repair                 | \$250,000<br>(\$16,182)<br>Previous Years<br>Funding | \$266,182        | CDBG           | DH-1        | 87               |
| <b>TOTAL</b>                          | <b>\$266,182</b>                                     | <b>\$266,182</b> |                |             | <b>87</b>        |
| <b>Homeless Prevention Objectives</b> |  |                  |                |             |                  |
| A New Leaf- East Valley Men's Center  | \$5,000  | \$5,000          | General Funds  | SL-1        | 8                |
| A New Leaf – EMPOWER Program          | \$5,000  | \$5,000          | General Funds  | SL-3        | 189              |
| A New Leaf – La Mesita Shelter        | \$5,000  | \$5,000          | General Funds  | SL-3        | 3                |

|   |  |                               |                      |      |                       |
|---|--|-------------------------------|----------------------|------|-----------------------|
| Central Arizona Shelter Services  | \$5,000  | \$5,000                       | General Funds        | SL-1 | 25                    |
| Save the Family   | \$5,000  | \$5,000                       | General Funds        | SL-1 | 3                     |
| <b>TOTAL</b>  | <b>\$25,000</b>                                | <b>\$25,000</b>               |                      |      | <b>228</b>            |
| <b>Community Development: Public Facilities/Infrastructure Objectives</b> |  |                               |                      |      |                       |
| A New Leaf – East Valley Men’s Center Renovations                         | \$0  | \$18,000 (Prior year funding) | CDBG                 | SL-3 | 8                     |
| CASS – Facility Improvements  | \$50,000                                       | \$0                           | CDBG                 | SL-3 | 0                     |
| Family Promise – Lighting Improvements                                    | \$70,593                                       | \$69,116                      | CDBG                 | SL-3 | 10                    |
| Heritage District Pedestrian Safety Project                               | \$87,416 (\$489,516 in Previous Years Funding) | \$510,908                     | CDBG                 | SL-3 | 8,284                 |
| <b>TOTAL</b>  | <b>\$682,170</b>                               | <b>\$648,693</b>              |                      |      | <b>8,302</b>          |
| <b>Community Development: Public Services Objectives</b>                  |  |                               |                      |      |                       |
| Gilbert Senior Center: Senior Meals                                       | \$112,315                                      | \$112,315                     | CDBG                 | SL-3 | 1,316                 |
| <b>Anti-poverty Objectives</b>  |  |                               |                      |      |                       |
| Gilbert CAP Office  | \$121,000                                      | \$121,000                     | General Funds        | SL-3 | 2,185                 |
| The Salvation Army  | \$9,000  | \$9,000                       | General Funds        | SL-3 | 93                    |
| <b>TOTAL</b>  | <b>\$140,966</b>                               | <b>\$140,966</b>              |                      |      | <b>2,278</b>          |
| <b>Non-homeless Special Needs Objectives</b>                              |  |                               |                      |      |                       |
| United Food Bank  | \$3,000  | \$3,000                       | General Funds        | SL-3 | 32,382                |
| <b>TOTAL</b>  | <b>\$3,000</b>                                 | <b>\$3,000</b>                |                      |      | <b>32,382</b>         |
| <b>Youth Services Prevention/Intervention</b>                             |  |                               |                      |      |                       |
| Gilbert Boys & Girls Club   | \$123,000                                      | \$123,000                     | General Funds        | SL-3 | 2,089                 |
| <b>TOTAL ALL SOURCES</b>  | <b>1,352,633</b>                               | <b>\$1,319,156</b>            |                      |      | <b>46,682</b>         |
| <b>HUD Outcome Code Key</b>   | <b>Availability/Accessibility</b>              |                               | <b>Affordability</b> |      | <b>Sustainability</b> |
| Decent Housing  | DH-1   |                               | DH-2                 |      | DH-3                  |
| Suitable Living Environment   | SL-1   |                               | SL-2                 |      | SL-3                  |
| Economic Opportunity  | EO-1   |                               | EO-2                 |      | EO-3                  |

Affirmatively Further Fair Housing

The Town identified five impediments to fair housing choice in its Analysis of Impediments to Fair Housing Choice. The Town continued to make progress on each of the goals and strategies to address each impediment. Specific activities are explained below.

**Impediments and Actions**

**IMPEDIMENT:** Town of Gilbert residents experience housing discrimination and do not realize they are being discriminated against and do not know the resources or processes to file complaints.

**GOAL:** Prevent Housing Discrimination

**Strategy:** Dedicate town staff and Council support to publicly acknowledge to the Town’s residents efforts to prevent housing discrimination within the Town of Gilbert.

**Activity 1:** Maintain a Fair Housing Coordinator to facilitate fair housing activities in Gilbert

**Implementation period:** Ongoing through 5-year Consolidated Planning Period 2010-2015

**Status:** Completed (April 2011)

**Rationale:** Upon filling the staff vacancy of the Community Development Specialist, it was clarified in the job description that this position would coordinate all fair housing activities on behalf of the Town of Gilbert.

**Proposed Investment:** 5% staff time of the Community Development Specialist position, or approximately \$2,935 annually.

**Activity 2:** Adopt a Proclamation declaring April as Fair Housing Month

**Implementation period:** Ongoing through 5-year Consolidated Planning Period 2010-2015

**Status:** completed April 2014 and annually thereafter

**Rationale:** The Town will complete this task annually in April of each year. The Proclamation will be conducted at a public Council meeting and the Proclamation will be clearly displayed in public view of the Parks & Recreation lobby.

**Proposed Investment:** There is no cost other than staff and Council time to complete a Proclamation.

**Strategy:** Implement specific and targeted activities to inform Town of Gilbert residents of signs of housing discrimination, how to file complaints, and provide resources and referrals to residents experiencing housing discrimination.

**Activity 1:** Publish notices about the right to fair housing through website, city publications, and other sources.

**Implementation period:** Ongoing throughout consolidated planning period of 2010-2015.

**Status:** Website update completed August 2011. City publications (100% complete)

**Rationale:** A Fair Housing page was always maintained on Gilbert's website, however, the page was updated in August 2011 to provide direct links for complaint filing and updated with a more user friendly format and reduced reading level language to describe fair housing. The Town launched a new website in early 2014 and fair housing information is included and easier to find for users.

The Town has developed two Fair Housing Brochures; 1) 10 Most Common Housing Mistakes developed for landlords, real estate agents, developers, etc. and; 2) Gilbert Fair Housing, developed for tenants, general public, and information/referral resources. The Town distributes the Gilbert Fair Housing brochure to all new residents requesting a new resident packet and is included in informational bags at various special event venues including 1,200 flyers distributed during the Gilbert Day's Event and 1,000 flyers distributed at Gilbert's Fall Music & Halloween Festival.

**Proposed Investment:** Posting and formatting of Fair Housing webpage took two (2) staff hrs estimated to cost \$56.00. Brochure development took five (5) staff hrs estimated to cost \$140. A total of 1,500 brochures have been printed and distributed in various locations and events costing \$525. Approximately 450 homes are registered annually as rentals - brochure copy and mailing costs are \$300.00.

**Activity 2:** Participate in The Fair Housing Partnership public awareness and activities

**Implementation period:** On-going throughout consolidated planning period of 2010-2015

**Status:** Implemented in July 2012

**Rationale:** The Town of Gilbert participates in the Arizona Fair Housing Partnership as a member, stays informed through newsletters and publications and attends meetings and seminars when available

**Proposed Investment:** Staff time, mileage, and training participation with an Arizona Fair Housing partner coalition will cost \$800 annually.

**Activity 3:** Maintain a call log for fair housing complaints and referrals

**Implementation period:** Implemented in September 2011 and will be maintained throughout the consolidated planning period from 2010-2015

**Status:** Completed (September 2011)

**Rationale:** A call log was created in September 2011 to track any calls received from residents to the Town of Gilbert regarding housing discrimination or any other fair housing issue. The call log records the date, caller information, nature of inquiry, referral/resource provided, and whether a complaint was made. From September 2011 through present, eighteen calls have been received and recorded on the call log.

**Proposed Investment:** There was no cost to create the call log. Staff time to take calls, record and provide resources and referrals is reflected in the 5% times spent on Fair Housing activities as noted above.

**Activity 4:** Make fair housing referrals to the HUD Fair Housing hotline and/or Arizona Attorney General's Office

**Implementation period:** Implemented in August 2011 and on-going throughout the consolidated planning period of 2010-2015

**Status:** Complete and on-going

**Rationale:** With the creation of the call log and updates to the website, Town staff has and will continue to make referrals to the HUD Fair Housing Hotline and/or the Arizona Attorney General's office. Of the eighteen calls received to date, twelve were referred to HUD and AZ Attorney General's office. The remaining six were referred to our local legal aid agency for assistance with a landlord/tenant issue, not a fair housing issue.

**Proposed Investment:** There is no cost to make referrals for fair housing issues.

**IMPEDIMENT: Town of Gilbert residents are not familiar with Fair Housing issues and do not understand their rights to fair housing choice.**

**GOAL:** Increase Public Awareness of Fair Housing Issues

**Strategy:** The Town of Gilbert will utilize various opportunities and mechanisms to provide Town residents with information and referral information regarding fair housing issues.

**Activity 1:** Annually distribute a flyer about Fair Housing Month through nonprofits, Gilbert offices, and other sources.

**Implementation period:** Implemented March 2012 and in March annually throughout the consolidated planning period of 2010-2015.

**Status:** Information is disseminated through the Town's Channel 11, website, Neighborhood Services newsletter, Parks & Recreation Activity Guide as screen shots on monitors located at all recreation facilities in Town.

**Rationale:** While historically the Town has adopted April as Fair Housing Month, there have been little to no activities during the month of April to support Fair Housing. Staff hosted a Fair Housing Event on April 17, 2014 at the Southeast Regional Library. Speakers from the AG's office, Community Legal Services and the Southwest Fair Housing Council presented on

various topics surrounding fair housing, reporting, and investigation process. While the attendance was limited, participants felt the information was well received.

**Proposed Investment:** Costs for the April Fair Housing Event was \$1,200.

**Activity 2:** Annually work with utility services to deliver a brief message on fair housing through the monthly utility bills.

**Implementation period:** April 2015 and annually in the month of April through the consolidated planning period of 2010-2015

**Status:** Not complete – to be completed in April 2015 and annually thereafter

**Rationale:** In order to reach the largest amount of Gilbert residents, Gilbert proposes one of the Fair Housing Month activities to include a short message in the April utility bills. The message will provide a brief statement regarding Fair Housing and will provide the Town's Fair Housing website address and contact information for the Town's Fair Housing Coordinator. To date, staff has not been able to reserve the April message space in the utility bill due to prior utility staff commitments.

**Proposed Investment:** It is anticipated that inclusion of the message in the Town's utility bills with cost \$1,500 annually. This includes the printing and insertion of the Fair Housing information into the utility bills.

**Activity 3:** Annually work with other communities to sponsor or put on a fair housing training for area residents on a variety of fair housing issues.

**Implementation period:** Fall – spring of 2016 and every other year throughout the consolidated planning period 2010-2015.

**Status:** See Activity 1 above.

**Rationale:** Gilbert produced one resident training (mentioned above) in April 2014. Gilbert also promoted other municipality fair housing events to ensure residents could participate in a local event if not able to participate in Gilbert's event.

**Proposed Investment:** It is anticipated that the Town of Gilbert will host one seminar every other year at an approximate cost of \$1,500.

**Activity 4:** Display fair housing posters and make fair housing materials available in Gilbert's housing and other public resource offices.

**Implementation period:** Ongoing throughout the consolidated planning period of 2010-2015

**Status:** Complete. Town staff distributes copies of the Gilbert Fair Housing brochure in various Town hall locations available to the public, the Town's local senior center, Community Action Program (CAP office), and two libraries and three (3) Gilbert run recreation centers. These brochures are tracked and replenished as needed.

**Rationale:** Town staff disseminates fair housing materials in a variety of venues and formats to reach a broad range of residents. In addition to keeping fair housing materials stocked at all Gilbert run facilities, staff has included an ad regarding fair housing and reference to Gilbert's fair housing webpage in the Town's four annual Recreation Guides. The Recreation Guides are available on-line only but receive on average 15,000 resident views per guide. Staff is able to track the number of hits to the fair housing webpage which began in July 2012. In addition, the Town has televisions located in all recreation facilities with rolling information which runs during facility business hours. The Town has placed a screen shot of fair housing information and referral to the Town's fair housing webpage on the rolling information screens throughout the year.

**Proposed Investment:** There is no cost to run an ad in the Recreation Guides or include information on the rolling screens as this will be provided in-kind by the Town's Community Services department.

**Activity 5:** Maintain a fair housing page on the Gilbert website with links to HUD Fair Housing, Arizona Attorney General Civil Rights Division, and other fair housing resources.

**Implementation period:** On-going throughout the consolidated planning period of 2010-2015.

**Status:** Completed August 2011 and on-going.

**Rationale:** A Fair Housing page was always maintained on Gilbert's website, however, the page was updated in August 2011 to provide direct links for complaint filing and updated with a more user friendly format and reduced reading level language to describe fair housing.

**Proposed Investment:** Posting and formatting of Fair Housing webpage took two (2) staff hrs estimated to cost \$56.00. Ongoing updates to the Fair Housing webpage have no costs other than staff time.

**IMPEDIMENT:** Town of Gilbert residents are unaware of predatory lending practices and do not know how to prevent foreclosure of their home or resources available to assist with preventing foreclosures.

### **GOAL: Prevent Foreclosures and Predatory Lending**

**Strategy:** The Town of Gilbert will provide educational opportunities to residents to help identify predatory lending practices and to provide resources and referrals to local nonprofits and agencies that may assist in preventing foreclosures.

**Activity 1:** Make information and brochures available to the public with information on foreclosure prevention and loan mitigation opportunities.

**Implementation period:** To be implemented during the fall of 2014 and ongoing thereafter through the consolidated planning period of 2010-2015.

**Status:** Not complete

**Rationale:** Staff proposes to develop brochures and make available to the public information on foreclosure prevention and loan mitigation opportunities. This has not been completed to date and is scheduled for completion during the fall of 2014. Dissemination of information will be coordinated through the Town's various resident communication opportunities and will partner with the Town's Neighborhood Services Department. This provides the largest opportunity to disseminate information to current Gilbert homeowners.

**Proposed Investment:** Depending on the number of copies and direct mailings of brochures, proposed costs are anticipated to be \$1,000 - \$1,200 annually.

**Activity 2:** Work with Arizona Foreclosure Prevention Task Force and other organizations to encourage loan modifications and discourage predatory lending.

**Implementation period:** On-going through the consolidated planning period of 2010-2015

**Status:** Not complete

**Rationale:** During the previous consolidated planning period (2004-2009), the Town of Gilbert was heavily involved in the Arizona Foreclosure Prevention Task Force and participated in two east valley foreclosure prevention events. Current staff has added links and resources from the Arizona Foreclosure Prevention Task Force webpage to Gilbert's webpage to offer a direct access to information and resources. Staff will explore future partnership opportunities between the Town of Gilbert and the Arizona Foreclosure Prevention Task Force.

**Proposed Investment:** There are currently no costs associated with referrals to the Arizona Foreclosure Prevention Task Force.

**Activity 3:** Encourage and refer residents to information and classes on homebuyer education and foreclosure prevention provided by nonprofit agencies.

**Implementation period:** On-going through the consolidated planning period of 2010-2015



**Status:** On-going

**Rationale:** In August 2011, Town staff updated the new homebuyer and homeowner resources webpage located on the Town's website. Staff receives approximately 5-10 calls per month requesting information about first-time home buying opportunities in Gilbert. While the Town does not currently offer a Down Payment Assistance Program or fund any nonprofits providing homebuyer counseling, staff refers callers to non-profit certified homebuyer counseling agencies and emphasizes to callers the importance of becoming fully knowledgeable about the home buying process to avoid predatory lending and reduce the risk of foreclosure in the future.

**Proposed Investment:** There are currently no costs associated with referrals for home buying education or foreclosure prevention.

**IMPEDIMENT:** Town of Gilbert residents are unaware affordable housing options with disability accessibility and the rights of tenants in need of accessibility modifications. Disabled residents are also not aware of their housing choice rights in regards to their disability.

**GOAL: Increase Disability Accessibility**

**Strategy:** The Town of Gilbert will provide opportunities for residents to become educated about their housing rights in relation to a disability and the Town will provide resources and referrals to residents in need of accessible affordable housing options within Gilbert.

**Activity 1:** Annually partner with other East Valley cities and nonprofits to sponsor a community event on fair housing and disability issues.

**Implementation period:** Activities under this goal will take place during the last two years of the consolidated planning period of 2013 and 2015.

**Status:** Not complete

**Rationale:** The Town will research activities performed by other East Valley cities and nonprofits relating to fair housing and disability issues. The Town will offer to partner and host community events related to this topic. If no such events exist, the Town will approach other east valley cities and non-profits to host an event in the east valley.

**Proposed Investment:** Depending on the size of the event and number of east valley city or non-profit partnerships, it is anticipated that a community event could cost \$1,000 - \$1,500.

**Activity 2:** Provide information and resources for Gilbert staff on accessibility and the need for accessible units

**Implementation period:** On-going throughout the consolidated planning period of 2010-2015.

**Status:** 25% completed. The anticipation completion date is May 2015 and on-going thereafter.

**Rationale:** Since April 2011 to date, the Town has received ten (10) calls from disabled residents inquiring about accessible affordable housing options. The Town has assisted these residents with obtaining a viable accessible affordable rental home(s). The Town has placed on its webpage, information pertaining to LIHTC multi-family affordable rental options, but has not obtained information about the number of accessible units available in each complex. Staff proposes to conduct a thorough inventory of accessible housing options to include on the Town's website and to more accurately make referrals for inquiring residents. It is anticipated this task to be completed by the end of March 2015.

**Proposed Investment:** The proposed investment includes staff time as stated on page 2 above and does not anticipate further costs.

**Activity 3:** Encourage development of accessible and adaptable housing units on all projects receiving federal funds

**Implementation period:** On-going throughout the consolidated planning period of 2010-2015.

**Status:** On-going

**Rationale:** The Town of Gilbert does not currently have any projects involving the development of accessible housing units. The Town has previously contracted with a non-profit utilizing HOME funds to purchase and rehabilitate single-family homes for permanent affordable rentals however, only two (2) of the ten homes purchased to date can be fully adaptable for accessibility. The Town has had discussions with the Maricopa HOME Consortium to partner with other jurisdictions on multi-unit dwelling projects to increase the amount of affordable and accessible rental units. The discussions are preliminary but would assist the Town greatly in increasing affordable and accessible housing units by pooling multiple jurisdictions' federal resources. The Town will continue to explore ways to increase and encourage accessible affordable housing choices in Gilbert.

**Proposed Investment:** No costs are associated with this activity at this time.

**IMPEDIMENT:** Town of Gilbert residents are unaware affordable housing options with disability accessibility and the rights of tenants in need of accessibility modifications. Disabled residents are also not aware of their housing choice rights in regards to their disability.

### **GOAL: Improve Public Policies and Public Support for Fair Housing**

**Strategy:** In order to improve public policies and engage public support for fair housing, Town of Gilbert staff must stay educated on fair housing topics to provide the best referrals and resources to residents and to develop or improve the planning and zoning codes consistent with fair housing and disability access requirements.

**Activity 1:** Provide information on fair housing training to interested Development Services and other Town of Gilbert staff.

**Implementation period:** on-going throughout the consolidated planning period of 2010-2015.

**Status:** Complete and on-going

**Rationale:** Town staff is committed to participating in fair housing training and notifying other interested Town staff of available training opportunities.

**Proposed Investment:** It is anticipated that annual staff training on fair housing costs will be approximately \$500

**Activity 2:** Review Gilbert planning and zoning codes to ensure consistency with fair housing and disability access requirements in the Fair Housing Act.

**Implementation period:** Fall of 2012 and ongoing throughout the consolidated planning period of 2010-2014.

**Status:** Complete

**Rationale:** Town staff has completed an Infrastructure Master Plan which includes public buildings and facilities, streets and pedestrian walkways. The Infrastructure Master Plan has a dedicated section included specifically on ADA accessibility. The plan identifies priorities and mechanisms to ensure all public facilities and uses have accessibility for those with disabilities. In addition, in 2014, the Town adopted a new building code with enforces planning and zoning codes to ensure current ADA standards are in place for new residential dwellings and businesses.

**Proposed Investment:** There is not cost for reviewing planning and zoning codes other than staff time described.

**TOTAL ANNUAL PROPOSED INVESTMENT: \$11,460**  
**TOTAL CONSOLIDATED PLANNING PERIOD PROPOSED INVESTMENT: \$57,300**  
**(FY 2011 through FY 2015)**

Under Served Needs and Gaps in Service

Fiscal Year 13/14 was the second year implementation of the Town's General Fund Drawdown Policy. This policy, adopted by Council in 11/12, will reduce the amount of general funds available for non-profit services over the next five years until it reaches zero. The Town reduced the general funds 10% from \$330,000 to \$297,000. This creates an obstacle in meeting underserved needs and filling in gaps in services as the resources are being decreased and demand for services increase.

Town staff continues to educate Council, public officials and the general public regarding the needs, gaps in services, leveraged resources utilized by non-profits and the interconnectivity of various funding sources that allow programs and services to operate cost effectively.

In November 2013, the Town issued a Request for Proposals to complete the first ever Human Service Needs Assessment. An outside consultant was hired to conduct a series of surveys and focus groups throughout the community to determine the strengths, weaknesses and gaps in service available to Gilbert residents. The assessment was completed in early 2014 and a final report was issued. The report listed 18 recommendations for the Town to consider better meeting the needs of the community and enhancing service delivery. Town Council will be reviewing and prioritizing the recommendations at their August 2014 Council retreat to provide direction on which recommendations will be implemented and prioritized to be completed first. It is the goal of the needs assessment to better education public officials and the general community about the unique needs in Gilbert and to initiate dialogue and action plans to address those needs.

The Town continues to provide its limited resources to programs and services that are the most cost effective and provide the most impact for Gilbert residents. The Town also continues to cultivate partnerships with other grass roots Gilbert organizations such as the Gilbert Community Action Network and For Our City. Both of these organizations support local non-profits by providing fundraising events, volunteer opportunities and disseminate education and outreach material to the general public.

Leveraged Resources

Gilbert's 2013-14 allocations of \$799,911 in CDBG funds and \$175,038 in HOME funds were leveraged with \$297,000 in local Gilbert funds and \$8,000 in voluntary donations. Gilbert's CDBG and HOME funds are also leveraged by additional state, county, local, and private fund sources received by funded nonprofits that provide the services described in this report.

**Managing the Process**

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

Program Year 4 CAPER Managing the Process response:

The Town of Gilbert has one Community Development position that administers all CDBG and HOME funded projects and contracts. The Town receives CDBG funds as an entitlement community and receives HOME funds as an active member of the Maricopa County HOME Consortium.

A single annual allocation process, facilitated by the Community Development Supervisor, in developing annual funding priorities, review and evaluate funding applications and create federal and general fund recommendations for Mayor and Town Council. Community Development staff reviewed all federal projects for adherence to 24 CFR part 570.208 with respect to meeting one of the CDBG National Objectives as well as alignment with local priorities and Town General Plan Strategic Initiatives.

Town staff encouraged public participation in both the consolidated planning process as well as the annual planning process through a variety of public hearings at both the Community Services Committee meetings, Town Council meetings, public notices in newspaper publications and on the Town's website.

Most CDBG and HOME funded activities were carried out through non-profit partnerships that entered into a formal contract with the Town. The contract specifies all local, state and federal regulations and performance measures. Staff monitored CDBG subrecipients for compliance and performance criteria. Any deficiencies discovered were supplied in writing to the subrecipient and additional technical assistance was provided to resolve said deficiencies.

Finally, Community Development staff participated in local and regional collaborations to support local and regional housing and social service initiatives. Staff also participated in HUD sponsored training and other training opportunities related to program administration and federal requirements.

## **Citizen Participation**

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

\*Please note that Citizen Comments and Responses may be included as additional files within the CPMP Tool.

Program Year 4 CAPER Citizen Participation response:

A draft of the 2013-2014 CAPER was posted on the Town of Gilbert's website on Wednesday, September 10, 2014 at [www.gilbertaz.gov](http://www.gilbertaz.gov) which provided details and contact information for the 15-day public comment period. In addition, a display ad was published in the Arizona Republic on Thursday, September 11, 2014 notifying the public of the availability of the CAPER for review and how to make public comments. The 15-day comment period ran from Thursday, September 11, 2014 through Friday, September 26,

2014. Documentation of the public notice can be found in the Appendices. CAPER, attachments, and IDIS reports are available to the public, in a variety of formats including electronic formats at no cost.

**Public Comments:**

No comments received.

Funds were distributed Town-wide for public services and emergency and minor home repair programming. All residents were eligible to receive so long as they income qualified. Infrastructure improvements were geographically distributed in the downtown Heritage district of the Town, in the only area-eligible census tracts in the Town. Other facility improvements were distributed outside of Town limits to homeless providers located in other jurisdictions but still serving Gilbert residents.

**Institutional Structure**

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

Program Year 4 CAPER Institutional Structure response:

The Town of Gilbert has legal authority and responsibility for determining goals and priorities and for contractual agreements related to CDBG funding for housing and community development.

The Town administered a comprehensive single funding process for social service, affordable housing, and community development activities. This funding process allocated general funds, Neighbor 2 Neighbor funds, and CDBG funds. There were no applications in FY 13/14 for HOME funds. In May 2013, staff presented funding recommendations to Town Council which in turn approved a total of \$297,000 in general funds, \$8,000 in Neighbor 2 Neighbor funds, and \$799,911 in CDBG funds.

Finally, Gilbert collaborated with local and regional partners to help facilitate solutions and funding for social service and housing issues. As a member of the Maricopa HOME Consortium, Gilbert has ongoing relationships with all the other entitlement communities in the metro Phoenix area. In addition, Gilbert Community Development staff participates in a local initiative, Gilbert Community Action Network (CAN). The Gilbert CAN is an ad-hoc coalition of local non-profit leaders, residents and business owners who meet regularly to discuss and collaborate on local issues and projects.

**Monitoring**

1. Describe how and the frequency with which you monitored your activities.
2. Describe the results of your monitoring including any improvements.
3. Self Evaluation
  - a. Describe the effect programs have in solving neighborhood and community problems.
  - b. Describe progress in meeting priority needs and specific objectives and help make community's vision of the future a reality.

- c. Describe how you provided decent housing and a suitable living environment and expanded economic opportunity principally for low and moderate-income persons.
- d. Indicate any activities falling behind schedule.
- e. Describe how activities and strategies made an impact on identified needs.
- f. Identify indicators that would best describe the results.
- g. Identify barriers that had a negative impact on fulfilling the strategies and overall vision.
- h. Identify whether major goals are on target and discuss reasons for those that are not on target.
- i. Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

Program Year 4 CAPER Monitoring response:

### **Monitoring**

The Town of Gilbert reviews all federally-funded contracts to determine risk and selection for monitoring. Selected projects to be monitored are conducted through site visits and document review to ensure funds were expended accordingly, organizations had system in place, and federal regulations were followed:

- Policies and procedures including but not limited to: personnel hiring practices, procurement, records retention, affirmative marketing, grievance procedures, Limited English Proficiency, Conflict of Interest and more;
- Financial policies and procedures including but not limited to: audits and management letters, accounting policies, payroll registers, reimbursement processes, Match schedules (as applicable) and more;
- Program files including but not limited to: income verification, legal residency, housing policies, demographic information, client's rights and notices and more;
- Performance measurements including but not limited to: quarterly reports, organization reports and annual plans, logic models, etc.

Organizations contracted for services must report activities every quarter identifying program demographics and status of measurable outcomes as specified in their funding contract. In addition, financial reimbursements are required monthly with appropriate back-up demonstrating that expenses were incurred for appropriate line items and that budgetary requirements are being met.

Technical assistance is given on an on-going basis to provide clarification of regulations, answer questions, and offer solutions should a barrier arise during program implementation.

Gilbert also participated with other communities in a team monitoring as part of the Maricopa HOME Consortium monitoring team. Through the Maricopa HOME Consortium, Gilbert has maintained contact with other cities and Maricopa County who fund many of the same agencies as Gilbert. Concerns resulting from their individual on-site monitoring visits, joint monitoring visits with multiple cities, and management of their contracts were shared with the Consortium members.

### **Self Evaluation**

The activities and strategies identified in the Town of Gilbert's five year Consolidated Plan are implemented incrementally over each year during that planning period. FY 13/14 is the fourth year of the five year plan. Signification changes have taken place both internally and

externally since the Five Year Consolidated Plan was submitted and priorities were identified. Internal staff has changes as well as management and Council members. These changes result in new priorities and direction for use of federal funds within the Town.

Gilbert continues to struggle with overcoming the stereotype of affordable housing in its community and has taken great strides to educate both elected officials and the general public. Staff have successfully partnered with non-profits and the faith community to meet as many needs, including housing, as possible. In an effort to assist with education the first ever Human Services Needs Assessment was completed in FY 13/14. An outside consultant was hired to identify the strengths, weaknesses and gaps of service needed and requested by Gilbert residents. The results showed that there continues to be a lack of understanding about resources available and how to navigate the multiple qualification processes to receive assistance. There were a total of 18 recommendations included in the report to assist in meeting the needs of residents as well as enhance service delivery.

During the next fiscal year, the Town will utilize the results of the needs assessment to prioritize funds to fill the gaps in services, provide further education to the community regarding the nature and need of assistance and implement processes to help residents find the necessary resources they need.

The Town has been successful in the programs and services currently provided, however, in determined to better meet the needs of the community and overcome obstacles in providing those services.

## **Lead-based Paint**

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

Program Year 4 CAPER Lead-based Paint response:

According to the 2005-2009 American Fact Finder (U.S. Census) there are less than 1,000 housing units in Gilbert that have the potential for lead based paint. However, the Gilbert Emergency and Minor Repair program provides education and information regarding lead hazards to homeowners participating in the program. Lead testing and abatement is conducted as part of the program as necessary. Lead based paint hazard requirements are followed for all housing programs including providing notice to participants and testing surfaces when required. No lead hazards were encountered by the program in 2013-2014.

## **HOUSING**

### **Housing Needs**

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

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

Program Year 4 CAPER Housing Needs response:

The Town of Gilbert identified three objectives as high priority and two objectives as medium priority to foster and maintain affordable housing in Gilbert's Consolidated Plan. The objectives are as follows:

High Priority:

- Single family housing emergency repair and minor home rehabilitation
- Single family housing major rehabilitation and reconstruction
- Acquisition and/or rehabilitation of rental housing

Medium Priority:

- Homebuyer assistance
- New rental housing

In FY 2013/14, the Town of Gilbert provided CDBG funds for one of the three high priority objectives. A total of \$250,000 in 13/14 funds and \$16,182 in previous years CDBG funds were allocated to single family emergency repair and minor home rehabilitation assisting 87 Gilbert homeowners remedy unsafe and hazardous conditions in their home.

The Town did not allocate its FY 13/14 HOME funds as no applications for service were received during the annual request for proposal process. The Town is currently reviewing the best use of HOME funds to meet the housing needs within the community. It is anticipated that FY 13/14 funds will be combined with future HOME fund allocations to contract with a non-profit to make a larger impact within the community by utilizing two years' worth of HOME fund allocations.

The Town has a total of (10) affordable housing single family units as well as three LIHTC apartment complexes. The completion of the Human Services Needs Assessment will help guide in prioritization of federal funds to increase affordable housing options for Gilbert residents.

## Specific Housing Objectives

1. Evaluate progress in meeting specific objective of providing affordable housing, including the number of extremely low-income, low-income, and moderate-income renter and owner households comparing actual accomplishments with proposed goals during the reporting period.
2. Evaluate progress in providing affordable housing that meets the Section 215 definition of affordable housing for rental and owner households comparing actual accomplishments with proposed goals during the reporting period.
3. Describe efforts to address "worst-case" housing needs and housing needs of persons with disabilities.

### Program Year 4 CAPER Specific Housing Objectives response:

Gilbert's emergency and minor home repair program helps maintain safe, accessible and quality homes for low and moderate income households. In 2013, 87 households received emergency and minor home repair improvements to remedy a health or safety concern, expending \$250,000 in 13/14 CDBG funds and \$16,182 in previous years CDBG funds. This was a sixty-one percent increase in households assisted and was a record for the Town in



number served by this program. It has been determined that assisting Gilbert homeowners remain in their homes has been a beneficial and needed service in the community.

The Town did not allocate its FY 13/14 HOME funds and is in the process of evaluating the best use of HOME funds to bridge the gaps to affordable housing in Gilbert.

| Activity   | Specific Objectives                      | Outcome/ Objective                | HOME \$              | CDBG \$   | Other Resources       | Annual Expected Number | Actual Number |
|--|--|-----------------------------------|----------------------|-----------|-----------------------|------------------------|---------------|
| <b>Rental Housing Objectives</b>                               |  |                                   |                      |           |                       | <b>Units</b>           |               |
| 1.1 Acquisition & Rehab of rental units.                       | Acquisition & rehab of rental units      | DH-2                              | \$174,000            |           |                       | 2                      | 0             |
| 1.2 Acquisition & Development Assistance of new rental housing | New rental housing                       | DH-2                              |                      |           |                       | 0                      | 0             |
| <b>Owner Housing Objectives</b>                                |  |                                   |                      |           |                       | <b>Units</b>           |               |
| 2.1 Rehab of existing owner units.                             | Rehab of existing owner units            | DH-1                              |                      |           |                       | 20                     | 0             |
| 2.2 Provide homebuyer down payment support.                    | Provide homebuyer down payment support   | DH-2                              |                      |           |                       | 0                      | 0             |
| 2.3 Provide emergency repair program support.                  | Provide emergency repair program support | DH-1                              | \$0                  | \$266,182 |                       | 25                     | 87            |
| <b>HUD Outcome Code Key</b>                                    |  | <b>Availability/Accessibility</b> | <b>Affordability</b> |           | <b>Sustainability</b> |                        |               |
| Decent Housing   |  | DH-1                              | DH-2                 |           | DH-3                  |                        |               |

| <b>Renters Assisted by Income</b> |                      |               |                    |               |                          |
|-----------------------------------|----------------------|---------------|--------------------|---------------|--------------------------|
|                                   | <b>5 – Year Goal</b> |               | <b>Year 3 Goal</b> |               | <b>Percent Completed</b> |
|                                   | <b>Planned</b>       | <b>Actual</b> | <b>Planned</b>     | <b>Actual</b> |                          |
| 0-30% AMI                         | 2                    | 1             | 1                  | 0             | 50%                      |
| 31-50% AMI                        | 10                   | 9             | 3                  | 0             | 90%                      |
| 51-80% AMI                        | 5                    | 3             | 0                  | 0             | 60%                      |
| <b>Owners Assisted by Income</b>  |                      |               |                    |               |                          |
|                                   | <b>5 – Year Goal</b> |               | <b>Year 4 Goal</b> |               | <b>Percent Completed</b> |
|                                   | <b>Planned</b>       | <b>Actual</b> | <b>Planned</b>     | <b>Actual</b> |                          |
| 0-30% AMI                         | 60                   | 79            | 12                 | 30            | 132%                     |
| 31-50% AMI                        | 65                   | 112           | 13                 | 39            | 172%                     |
| 51-80% AMI                        | 25                   | 45            | 5                  | 30            | 180%                     |

Gilbert’s worst case housing needs are addressed through the County’s Section 8 program and low-income tax credit multi-family housing units. The Town of Gilbert has a total of three LIHTC housing complexes for a total of 631 low income units of which 100 are specifically for elderly housing.

## Public Housing Strategy

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

Program Year 4 CAPER Public Housing Strategy response:

There are no Public Housing or Section 8 programs based in Gilbert. Maricopa County's Section 8 program assists participants located in Gilbert. The Town has no plans to establish a Section 8 program within Gilbert. This is due to the high administrative cost of operating the program compared to the number of units that would be allocated to Gilbert, and no increased benefit from HUD in the form of additional vouchers or funding.

## Barriers to Affordable Housing

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

Program Year 4 CAPER Barriers to Affordable Housing response:

- Lack of Affordable Housing options: Gilbert has one of the highest median annual incomes in the valley. New homes continue to be built at a rapid pace, specifically in south Gilbert where there is still vacant land for development. New home prices are typically too high or require a significant down payment to be affordable for first time homebuyers. In addition, market rates for single family and multi-family rental units are high, which require lower income families to pay more than 30% of their monthly income towards housing costs. One of the overarching needs identified in the recently completed Human Service Needs Assessment state that one of overarching needs identified was access to affordable housing options.

While Gilbert did not allocate its HOME funds during this fiscal year, the Town will use the results of the needs assessment to help prioritize use of resources in the coming years. Town Council is currently reviewing options for use of HOME funds and will create a policy to provide direction on use of HOME funds that provide the largest impact for Gilbert residents in need.

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

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

- c. Describe outreach to minority and women owned businesses.

Program Year 4 CAPER HOME/ADDI response:

In year four, Gilbert issued a request for proposals during its annual funding process to allocate Gilbert’s HOME funds. No, applications were received. The Town did not allocate HOME funds and instead is prioritizing use of HOME funds that will provide the largest impact to both the community and residents that need housing assistance. The completion of the Human Services Needs Assessment will guide Gilbert in identifying the largest housing gaps and to prioritize limited resources to address those gaps. It is anticipated that FY 13/14 HOME funds will be allocated with FY 14/15 funds to contract with a non-profit provider to meet some of Gilbert’s housing needs.

## HOMELESS

### Homeless Needs

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

1. Identify actions taken to address needs of homeless persons.
2. Identify actions to help homeless persons make the transition to permanent housing and independent living.
3. Identify new Federal resources obtained from Homeless SuperNOFA.

Program Year 4 CAPER Homeless Needs response:

Gilbert supported regional efforts to combat homelessness and participated in the Maricopa County Continuum of Care through the Maricopa Association of Governments, which includes a Gilbert Town Councilmember. In FY 13, housing needs for homeless individuals was identified by Town Council as an approved funding priority for the fourth year, specifically programs that provide emergency and transitional housing for homeless individuals and families.

While the Town of Gilbert does not have a local homeless shelter within its jurisdiction, the Town allocated \$25,000 to five regional homeless services programs that provide emergency shelter, transitional shelter and homeless support services. A total of 228 homeless individuals previously residing in Gilbert were assisted by these providers. In addition, the Gilbert CAP Office and the Salvation Army were allocated a combined \$130,000 in general funds to assist 2,278 individuals and families at imminent risk of becoming homeless.

| Actions to address needs of homeless persons and families |             |        |                       |
|---|-------------|--------|-----------------------|
|   | Expenditure | Number | Source                |
| Bed Nights for Homeless                                   | \$25,000    | 228    | Gilbert General Funds |
| Homeless Prevention                                       | \$130,000   | 2,278  | Gilbert General Funds |

Many of the regional homeless service providers offered a variety of services in addition to basic needs to help homeless persons transition to permanent housing and independent living. Gilbert funds helped to support services such as job preparation and job placement, child care, educational goal attainment, parenting skills, budgeting, health related services,

and drug and alcohol dependency issues. Many homeless individuals must overcome a variety of barriers before being able to live independently and transition into permanent housing. Basic necessities include helping homeless persons obtain identification, disability benefits, state benefits, employment, and education. Regional homeless service providers complete an assessment of each person served and provides a case plan to ensure that individual needs are identified and met. The region has made a commitment to end chronic homelessness and has add new multi-family units for transitional housing to close the gap of homeless families and individuals moving from homelessness to transitional housing. Additional wrap-around services are provided to help prevent those who were previously homeless from becoming homeless again. While more needs to be done, there have been regional efforts to assist those being discharged from publicly funded institutions to prevent them from being homeless after discharge, however, the need is great and requires significant case management and additional services to help these individuals stabilize and integrate back into the general population.

### Specific Homeless Prevention Elements

1. Identify actions taken to prevent homelessness.

Program Year 4 CAPER Specific Homeless Prevention Elements response:

In 2013, Gilbert provided a total of \$155,000 in general funds and voluntary donations to non-profit organizations to assist in preventing homelessness. Several regional shelters were supported to provide emergency and transitional shelter to homeless individuals and families to avoid them living on the streets or having to double up in other housing units. Gilbert also funded organizations that provided emergency financial assistance to families in crisis and on the verge of being evicted therefore causing homelessness. A total of 2,506 families received emergency financial assistance to avoid homelessness. Other supportive services were provided such as food, clothing and utility assistance to alleviate the crisis and allow families to utilize their resources towards rent payments and to avoid eviction.

| Agency Name                          | Program Description  | Funding Category | Funding Source | Allocation Amount | Outcome/ People Served |
|--------------------------------------|--|------------------|----------------|-------------------|------------------------|
| A New Leaf- East Valley Men's Center | Homeless shelter for single adult men                                      | Emergency        | General Funds  | \$5,000           | 8                      |
| A New Leaf – EMPOWER Program         | Transitional housing and support for young adults aging out of foster care | Transitional     | General Funds  | \$5,000           | 189                    |
| A New Leaf – La Mesita Shelter       | Transitional housing and support for homeless families with children       | Transitional     | General Funds  | \$5,000           | 3                      |
| Central Arizona Shelter Services     | Homeless shelter and supportive services                                   | Emergency        | General Funds  | \$5,000           | 25                     |
| Chandler Christian Community Center  | Gilbert CAP Office   | Supportive       | General Funds  | \$121,000         | 2,185                  |
| The Salvation Army                   | Eviction Prevention  | Supportive       | General Funds  | \$9,000           | 93                     |
| Save The Family                      | Transitional housing and support for homeless families with children       | Transitional     | General Funds  | \$5,000           | 3                      |
| <b>TOTALS:</b>                       |  |                  |                | <b>\$155,000</b>  | <b>2,506</b>           |

### Emergency Shelter Grants (ESG)

Gilbert doesn't receive ESG funding.