

Sarasota, FL

Consolidated Annual Performance and Evaluation Report (CAPER) Program Year 2022

Prepared for the U.S. Department of Housing and Urban Development (HUD)



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Executive Summary

INTRODUCTION

The Consolidated Plan is a five-year road map for local jurisdictions that receive Federal funds for housing and community development activities. The plan is used to identify housing, homelessness, community development and economic development needs, and to establish a strategic plan for meeting those needs.

The Consolidated Annual Performance and Evaluation Report (CAPER) details the City of Sarasota's accomplishments during the Community Development Block Grant (CDBG) and HOME Investment Partnerships Program (HOME) Program Year (PY) 2022 toward meeting the goals outlined in the Sarasota Consortium 2021-2025 Five-Year Consolidated Plan.

The PY 2022 CAPER describes the City of Sarasota's program accomplishments for the period beginning October 1, 2022 and ending September 30, 2023. This period aligns with Federal Fiscal Year (FY) 2022 and the City of Sarasota FY 2023.

This report compares the actual performance measures with those projected in the City's PY 2022 Annual Action Plan. The CAPER reports on activities funded by the Federal CDBG and HOME programs, as well as highlighting a range of state and locally funded programs.

Detailed tables outlining the activities that were completed during PY 2022 are located throughout this CAPER report.

CR-05 Goals and Outcomes

PROGRESS THE JURISDICTION HAS MADE IN CARRYING OUT ITS STRATEGIC PLAN AND ITS ACTION PLAN. 91.520(A)

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

The Sarasota Office of Housing and Community Development (OHCD) administers the City's CDBG program, and the HOME program on behalf of the City of Sarasota and Sarasota County (Sarasota Consortium). This is the second reporting year for the Sarasota Consortium's 2021-2025 Consolidated Plan that covers PY 2022.

In 2021, the City of Sarasota and Sarasota County prepared, and HUD approved, the 2021-2025 Consolidated Plan. The Consolidated Plan identified community needs, the funding available to meet those needs, and prioritized how this funding would be used. Because the City of Sarasota is the recipient of the federal HOME and State Housing Initiatives Partnership (SHIP) funds, all affordable housing activities are included in the City's CAPER report regardless of whether they are physically located in the City of Sarasota or Sarasota County, or its member jurisdictions: the cities of North Port and Venice.

The City of Sarasota is confident that its federally funded programs help address the priorities of the Consolidated Plan and the Annual Action Plan and meet the needs of low and moderate-income persons within the Sarasota community. In addition to the major continued and ongoing efforts listed above, other projects were budgeted, and funds expended, for PY 2022. The status for projects budgeted in the PY 2022 Annual Action Plan, and funds expended, is as follows:

1. New Affordable Housing: The City continues to fund efforts that increase the number and quality of affordable housing units. In the Federal FY 2022 Annual Action Plan, the City allocated \$1,034,450 in HOME funds, and \$2,023,915 in SHIP funds to produce new owner-occupied units. Although no new owner-occupied units were produced in PY 2022, Habitat for Humanity Sarasota, Inc. will be completing twelve single family homes in Hammock Place in the next fiscal year. Hammock Place will be the first gated community solely for low-income households in Sarasota County. HOME funds will be utilized for those properties. Habitat for Humanity Sarasota, Inc. also has 22 additional properties assisted with CDBG, SHIP, or HOME funds they

purchased over the past two years and are developing for first-time homebuyers.

2. Acquisition of Property: In the Federal FY 2022 Annual Action Plan, the City allocated \$65,000 in CDBG funds for acquisition of property serving income-eligible households. During PY 2022, the City acquired the property at 2920 Lynnhurst Avenue using prior-year resources to benefit one low- to-moderate income household. Habitat for Humanity Sarasota, Inc. will be producing new affordable housing on the acquired property.
3. Housing Rehabilitation: This ongoing program provides for the rehabilitation of owner-occupied housing for low-income families. The program includes comprehensive rehabilitation of homes, essential system repairs (roof, HVAC, water, and sewer), removal of architectural barriers and the mitigation / elimination of lead-based paint hazards. CDBG and SHIP funds (\$95,000 and \$380,000, respectively, for PY 2022) were allocated toward this project. During PY 2022, the city funded housing rehabilitation and related program delivery, resulting in the rehabilitation of five (5) existing units using the two funding sources. Program delivery expenditures included environmental reviews, wage determination research, payroll review, inspections, and monitoring. Actual expenditures for housing rehabilitation and related program delivery in PY 2022 were \$99,834 in CDBG prior-year resources and \$113,764 in SHIP. Sarasota received 110 applications for housing rehabilitation assistance during PY 2022. Income eligible homeowners are assisted with a combination of federal and state funding. The program is open to City of Sarasota and Sarasota County residents whose household incomes do not exceed 80% Area Median Income (AMI).
4. Purchase Price Assistance: The City allocated \$500,000 in SHIP funding alone for Purchase Price Assistance in the Federal FY 2022 Annual Action. The maximum assistance amount was \$75,000 per eligible homebuyer.
5. Park Improvements: In the Federal FY 2022 Annual Action Plan, the City allocated \$231,191 in CDBG funds for park improvements at either Avion Park or Dr. Martin Luther King Jr. Memorial Park, as practical. However, actual project completion during PY 2022 was limited to a prior-year PY 2021 street improvements project at Cocoanut Avenue and Central Avenue. The Cocoanut Avenue and Central Avenue project included improvements to signage, medians with landscaping, bicycle/pedestrian lane striping, and lighting to benefit the surrounding low- and moderate-income neighborhood. There are City of Sarasota parks near this project, and because the project included pedestrian walkways/crosswalks, pedestrians have safer access to parks. Actual expenditures for the street improvement project were \$263,596 in prior-year resources.

6. CDBG/HOME Administration: The City of Sarasota allocated \$81,547 and \$114,938 in CDBG and HOME funds, respectively, to administer these programs in conformance with federal law. The City also allocated \$305,990 in SHIP funding for administration and planning efforts. During PY 2022, administrative expenditures for budgeting, planning, and reporting were covered by a combination of PY 2022 and prior-year PY 2021 CDBG and HOME funds.

If applicable, see additional Progress Narrative, at end of CR-05, for continued narrative about the progress the jurisdiction has made in carrying out its strategic plan and its action plan.

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COMPARISON OF THE PROPOSED VERSUS ACTUAL OUTCOMES FOR EACH OUTCOME MEASURE SUBMITTED WITH THE CONSOLIDATED PLAN AND EXPLAIN, IF APPLICABLE, WHY PROGRESS WAS NOT MADE TOWARD MEETING GOALS AND OBJECTIVES. 91.520(G)

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

TABLE 1A: ACCOMPLISHMENTS – PROGRAM YEAR

Goal	Category	Source / Amount (Annual Action Plan)	Outcome				
			Indicator	Unit Of Measure (UofM)	Program Year Expected	Program Year Actual	Percent Complete
Affordable Housing Availability/Access	Affordable Housing Public Housing	CDBG: \$65,000 / HOME: \$1,034,450 / SHIP: \$2,523,915	Rental units constructed	Household Housing Unit	5	0	0.00%
			Homeowner Housing Added	Household Housing Unit	7	0	0.00%
			Direct Financial Assistance to Homebuyers	Households Assisted	7	0	0.00%
Affordable Housing Maintenance	Affordable Housing	CDBG: \$95,000 / SHIP: \$380,000	Homeowner Housing Rehabilitated	Household Housing Unit	12	5	41.66%
Community Development	Non-Housing Community Development	CDBG: \$231,191	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1,125	1,295	115%
Homeless Needs	Homeless	CDBG: \$0	Other	Other	0	0	0.00%
Non-Goal Administration	Administration	CDBG: \$81,547 / HOME: \$114,938 / SHIP: \$305,990	Other	Other	0	0	0.00%
Special Needs	Non-Homeless Special Needs	CDBG: \$0	Other	Other	0	0	0.00%

Table 1A – Accomplishments – Program Year to Date (2022/2023)

TABLE 1B: ACCOMPLISHMENTS – STRATEGIC PLAN

Goal	Category	Funding	Outcome				
			Indicator	Unit Of Measure (UofM)	Strategic Plan Expected	Strategic Plan Actual	Percent Complete
Affordable Housing Availability/Access	Affordable Housing Public Housing	HOME: \$4,563,000/ SHIP: \$1,351,500	Homeowner Housing Added	Household Housing Unit	15	5	33.33%
			Direct Financial Assistance to Homebuyers	Households Assisted	100	0	0.00%
Affordable Housing Maintenance	Affordable Housing	CDBG: \$511,649/ SHIP: \$4,944,000	Homeowner Housing Rehabilitated	Household Housing Unit	140	23	16.43%
Community Development	Non-Housing Community Development	CDBG: \$1,488,351	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	6,500	2,305	35.46%
Homeless Needs	Homeless	CDBG: \$0	Other	Other	0	0	0.00%
Non-Goal Administration	Administration	CDBG: \$500,000 / HOME: \$507,000 / SHIP: \$674,500	Other	Other	0	0	0.00%
Special Needs	Non-Homeless Special Needs	CDBG: \$0	Other	Other	0	0	0.00%

Table 1B – Accomplishments – Strategic Plan to Date (2022/2023)

ASSESS HOW THE JURISDICTION'S USE OF FUNDS, PARTICULARLY CDBG, ADDRESSES THE PRIORITIES AND SPECIFIC OBJECTIVES IDENTIFIED IN THE PLAN, GIVING SPECIAL ATTENTION TO THE HIGHEST PRIORITY ACTIVITIES IDENTIFIED.

During PY 2022 (i.e., year two of the 2021-2025 Consolidated Plan), the City of Sarasota effectively used its CDBG and HOME funds to undertake a variety of programs, projects and activities designed to address housing and community development needs throughout the City and County.

The City and the County established nine (9) high priorities to be achieved during the 2021-2025 Consolidated Plan. Those priorities are as follows:

1. Rehabilitation of Affordable Housing
2. Production of Affordable Housing
3. Housing Assistance and Support Services
4. Mental and Behavioral Health Services
5. Senior Facilities and Services
6. Childcare Facilities and Services
7. Healthcare Facilities and Services
8. Neighborhood Improvements
9. Homeless Housing and Services

The Sarasota OHCD administers the City's CDBG program, and the HOME program on behalf of the City of Sarasota and Sarasota County (Sarasota Consortium). This is the second reporting year for the Sarasota Consortium's 2021-2025 Consolidated Plan that covers PY 2022. In 2021, the City of Sarasota and Sarasota County prepared, and HUD approved, the 2021-2025 Consolidated Plan. The Consolidated Plan identified community needs, the funding available to meet those needs, and prioritized how this funding would be used. Because the City of Sarasota is the recipient of the federal HOME and State SHIP funds, all affordable housing activities are included in the City's CAPER report regardless of whether they are physically located in the City of Sarasota or Sarasota County, or its member jurisdictions: the cities of North Port and Venice.

The City of Sarasota funded projects that directly addressed five of the nine high priority needs. Using HOME and SHIP funding, the City of Sarasota worked to acquire, rehabilitate, and produce new affordable housing. The City of Sarasota's CDBG and CDBG-CV funding supported projects for

rehabilitation of affordable housing, neighborhood street improvements, childcare, food distribution, and program administration.

If applicable, see additional Assessment Narrative, at end of CR-05, for continued narrative about how the jurisdiction's use of funds addresses the priorities and specific objectives identified in the plan.

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CR-10 Racial and Ethnic Composition of Families Assisted

DESCRIBE THE FAMILIES ASSISTED (INCLUDING THE RACIAL AND ETHNIC STATUS OF FAMILIES ASSISTED 91.520(A))

TABLE 2: FAMILIES ASSISTED

Race:	CDBG	HOME
White	28	3
Black or African American	2	0
Asian	0	0
American Indian or American Native	0	0
Native Hawaiian or Other Pacific Islander	0	0
TOTAL	30	3
Ethnicity:		
Hispanic	2	0
Not Hispanic	28	3

Table 2 – Assistance to Racial and Ethnic Populations by Source of Funds

NARRATIVE

All local jurisdictions that receive CDBG and HOME funding must maintain data on the extent to which each racial and ethnic group have applied for, participated in, or benefited from any federally funded program or activity. The City of Sarasota was able to collect this data by having all participants and sub-recipients report on income and racial/ethnic status. This tracking allows the City to maintain data on racial/ethnic information, household size, and household income of beneficiaries. During PY 2022, 30 persons were assisted with CDBG, and three (3) households were assisted with HOME. Of the HOME-assisted, all were elderly, extremely or very low income, and two (2) had female head of household.

The table above reflects only CDBG and HOME funding sources. Additionally, CDBG-CV CARES Act funding benefitted the following: 90 White, 105 Black or African American, one (1) Asian, two (2) Native Hawaiian or Other Pacific Islander, and 62 some other race or combination of races. Of these, 57 reported as Hispanic. The total number of persons assisted by CDBG-CV was 260. Of note, most persons assisted with CDBG-CV funds had female head of household. All persons assisted with CDBG-CV funds were either very low income or low income.

CR-15 Resources and Investments 91.520(a)

IDENTIFY THE RESOURCES MADE AVAILABLE.

Information in **Table 3** provides a detailed breakdown of resources that were made available through the CDBG, HOME, and various other programs and funding sources. This does not account for unspent prior year funds that may have contributed to expenditures or outstanding project balances.

According to Line 2 (Entitlement Grant) of the PR-26 CDBG Financial Summary Report for Program Year 2022, the City of Sarasota had \$397,738 available in entitlement CDBG funds. An additional \$65,000 of prior year resources and \$10,000 of new program income was anticipated. According to the PR-26 report, there were \$716,033.73 of unexpended CDBG funds from the previous program year and \$18,891.66 in program income available. The total amount of CDBG funds available was \$1,132,663.39. Additionally, the City of Sarasota planned for \$1,149,388 in HOME funds and \$3,209,905 in SHIP funds to carry out the goals outlined in the Sarasota Consortium 2021-2025 Consolidated Plan.

The City of Sarasota expended a total of \$387,732.66 in CDBG funds according to Line 15 (Total Expenditures) of the PR-26 CDBG Financial Summary Report for Program Year 2022. These CDBG funds were expended on program delivery for housing rehabilitation, street improvements, acquisition for affordable housing, and administration of the City's CDBG program.

TABLE 3: RESOURCES MADE AVAILABLE

Source of Funds	Source of Funds	Resources Made Available \$	Amount Expended During Program Year Program Year 2022
CDBG	Public - Federal	\$472,738	\$387,732.66
HOME	Public - Federal	\$1,149,388	\$152,708.20
Other	Public – State	\$3,209,905	\$841,465.93

Table 3 – Resources Made Available

NARRATIVE

In response to the COVID-19 pandemic, the City of Sarasota received a supplemental allocation of CDBG funds as authorized by the Coronavirus Aid, Relief, and Economic Security Act (CARES), Public Law 116-136, known as CDBG-CV in the total amount of \$714,628. To date, the City has expended \$571,704 in CDBG-CV funds to support the Boys and Girls Club and Children First to provide low- and moderate-income households with childcare and food distribution through All Faiths Food Bank. These activities supported a total of 260 low- and moderate-income persons/households (Boys and Girls Club, 31 youths in Federal FY 2022; Children First, 80 youths; and All Faiths Food Bank, 149 households). As of November 2023, there is \$142,924 in CDBG-CV funding remaining.

IDENTIFY THE GEOGRAPHIC DISTRIBUTION AND LOCATION OF INVESTMENTS.

Table 4 reflects the designated target area within the Consolidated Plan: low- and moderate-income areas.

TABLE 4: GEOGRAPHIC DISTRIBUTION AND LOCATION OF INVESTMENTS

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Low- and Moderate-Income Areas (LMA)	58%	66.27%	Home rehabilitation and acquisition for affordable housing benefited low- and moderate-income populations or occurred in low- and moderate-income areas. Street improvements occurred only in low- and moderate-income areas, representing 66% of the Federal FY 2022 CDBG allocation.

Table 4 – Geographic Distribution and Location of Investments

NARRATIVE

While some projects are geographically targeted, most projects (e.g., housing rehabilitation, etc.) benefit any eligible person within the City of Sarasota regardless of their location. The Central Avenue/Cocoanut Avenue street improvements project, which is geographically targeted, expended \$263,596, which represents 66% of the Federal FY 2022 CDBG allocation. Expenditures for overall low-

and moderate-income benefit totaled \$363,931, which represents 92% of the Federal FY 2022 CDBG allocation.

LEVERAGING

EXPLAIN HOW FEDERAL FUNDS LEVERAGED ADDITIONAL RESOURCES (PRIVATE, STATE AND LOCAL FUNDS), INCLUDING A DESCRIPTION OF HOW MATCHING REQUIREMENTS WERE SATISFIED, AS WELL AS HOW ANY PUBLICLY OWNED LAND OR PROPERTY LOCATED WITHIN THE JURISDICTION THAT WERE USED TO ADDRESS THE NEEDS IDENTIFIED IN THE PLAN.

The CDBG program does not require matching funds, but CDBG funds are leveraged by many other resources within the community. Many of these funding sources provide leverage from private and public sources for the CDBG projects undertaken. Subrecipients that receive CDBG funding also receive funding from federal, state, local, and other resources. Additionally, the City utilizes General Fund dollars, SHIP, Florida Challenge Grant, and State Emergency Grant Solutions funds which are received through the State of Florida.

Leveraging for the HOME program was provided through the utilization of \$841,465.93 in expended funds from the SHIP program. HOME and SHIP funds were expended between October 2022 and September 2023 toward rehabilitation for affordable housing. Three (3) housing rehabilitation projects were completed using matching SHIP funds in PY 2022, and the HOME funding will be drawn upon completion in PY 2023.

Of the three (3) HOME-funded housing rehabilitation projects, there was one (1) woman-owned business sub-contracted, and that business also qualified as a Section 3 business. The firm was paid \$300 of the \$20,279 contract. There were no primary contractors who qualified as Woman or Minority-Owned businesses, nor any Section 3 businesses as primary contractors.

For Program Year 2022, the City of Sarasota had a total disbursement of \$152,708.20 in HOME funds, with \$75,000 in disbursements requiring a match. According to PR-33 HOME Matching Liability Report for Program Year 2022, the Match Liability Amount is \$18,750.

TABLE 5: FISCAL YEAR SUMMARY – HOME MATCH

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	\$597,618.60
2. Match contributed during current Federal fiscal year	\$113,764.35
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	\$711,382.95
4. Match liability for current Federal fiscal year	\$18,750.00
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	\$692,632.95

Table 5 – Fiscal Year Summary – HOME Match Report

TABLE 6: MATCH CONTRIBUTION FOR THE FEDERAL FISCAL YEAR – HOME MATCH

Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Total Match
Janet Fennessey	06/23/2023	\$51,637.19	\$51,637.19
Marsha Spurlock	03/24/2023	\$19,089.97	\$19,089.97
Peter Linderman	09/13/2023	\$43,037.19	\$43,037.19

Table 6 – Match Contribution for the Federal Fiscal Year

TABLE 7: HOME MBE/WBE REPORT (PROGRAM INCOME)

Program Income – Enter the program amounts for the reporting period				
Balance on hand at beginning of reporting period \$	Amount Received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA	Balance on hand at end of reporting period \$
0	\$360,305.86	0	0	0

Table 7 – Program Income

TABLE 8: MINORITY BUSINESS ENTERPRISES AND WOMEN BUSINESS ENTERPRISES

Contracts – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period								
Total	Minority Business Enterprises				White Non-Hispanic	Women Business Enterprises	Male	
	Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic				
Contracts								
Dollar Amount	\$20,279	\$0	\$0	\$0	\$0	\$20,279	\$0	\$20,279
Number	1	0	0	0	0	1	0	1
Sub-Contracts								
Dollar Amount	\$300	\$0	\$0	\$0	\$0	\$0	\$300	\$0
Number	1	0	0	0	0	0	1	0

Table 8 – Minority Business Enterprises and Women Business Enterprises

TABLE 9: MINORITY OWNERS OF RENTAL PROPERTY

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

Table 9 – Minority Owners of Rental Property

TABLE 10: RELOCATION AND REAL PROPERTY ACQUISITION

Contracts – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
Total	Minority Property Owners					White Non-Hispanic
	Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic		
Dollar Amount	\$0	\$0	\$0	\$0	\$0	\$0
Number	0	0	0	0	0	0
Parcels Acquired	0	0	0	0	0	0
Businesses Displaced	0	0	0	0	0	0
Nonprofit Organizations Displaced	0	0	0	0	0	0
Households Temporarily Relocated, Not Displaced	0	0	0	0	0	0

Table 10 – Relocation and Real Property Acquisition

CR-20 Affordable Housing 91.520(b)

EVALUATION OF THE JURISDICTION'S PROGRESS IN PROVIDING AFFORDABLE HOUSING, INCLUDING THE NUMBER AND TYPES OF FAMILIES SERVED, THE NUMBER OF EXTREMELY LOW-INCOME, LOW-INCOME, MODERATE-INCOME, AND MIDDLE-INCOME PERSONS SERVED.

The OHCD continued administering federal funds to the benefit of low-income households and in predominantly low-income neighborhoods despite the lasting impacts of the COVID-19 pandemic. A total of 29 households were assisted with housing rehabilitation or related program delivery during Federal FY 2022 (City FY 2023), which was funded through both federal and state allocation sources. This number includes rehabilitation of four (4) existing units.

Federal HOME funds were leveraged with SHIP dollars to benefit low-income households. Of the four (4) existing units rehabilitated, three (3) utilized HOME funding.

Assistance was also provided for the acquisition of one (1) property at 2920 Lynnhurst Avenue, which was acquired with CDBG funds. Habitat for Humanity Sarasota, Inc. will use other funding to produce affordable housing at the Lynnhurst property. Additionally, in the next fiscal year, Habitat for Humanity Sarasota, Inc. will be completing 12 single-family homes in Hammock Place. Hammock Place will be the first gated community solely for low-income households in Sarasota County. HOME funding will be utilized for the Hammock Place project. Habitat for Humanity Sarasota, Inc. is also developing on 22 additional properties assisted with CDBG, HOME, or SHIP funds over the past two years, which will be sold to eligible first-time homebuyers.

Affordable housing progress by housing units, limited to direct assistance with City of Sarasota CDBG funds or HOME funds matched with SHIP, is shown below in **Table 11** and **Table 12**.

TABLE 11: AFFORDABLE HOUSING PROGRESS (HOUSEHOLDS)

	One-Year Goal	Actual
Number of homeless to be provided affordable housing units	0	0
Number of non-homeless to be provided affordable housing units	31	5
Number of special needs to be provided affordable housing units	0	0
TOTAL	31	5

Table 11 – Affordable Housing Progress (Number of Households)

TABLE 12: AFFORDABLE HOUSING PROGRESS (HOUSEHOLDS SUPPORTED)

Number of households supported through:	One-Year Goal	Actual
Rental Assistance	0	0
The Production of New Units	11	0
Rehab of Existing Units	12	4
Acquisition of Existing Units	8	1
TOTAL	31	5

Table 12 – Affordable Housing Progress (Number of Households Supported)

DISCUSS THE DIFFERENCE BETWEEN GOALS AND OUTCOMES AND PROBLEMS ENCOUNTERED IN MEETING THESE GOALS.

The production of housing is largely funded with HOME and SHIP funds that are received by the City of Sarasota on behalf of all jurisdictions in Sarasota County. Those accomplishments are reflected in the City of Sarasota's CAPER. The City's CDBG and HOME programs estimated that 12 low- and moderate-income households would be assisted with home rehabilitation in PY 2022, and eight (8) low- and moderate-income households would be assisted by acquisition. During PY 2022, the City of Sarasota leveraged HOME funds with SHIP dollars to provide funding for the Housing Rehabilitation Program, which benefitted three (3) households countywide, and used CDBG funding to benefit another two (2) households in the City of Sarasota. One (1) household will be assisted by acquisition.

DISCUSS HOW THESE OUTCOMES WILL IMPACT FUTURE ANNUAL ACTION PLANS.

Although this year's outcomes will have no effect on future annual action plans, the City will continue to focus on bringing more affordable housing to the City of Sarasota through implementation of housing programs and leveraging a diverse pool of funding options.

INCLUDE THE NUMBER OF EXTREMELY LOW-INCOME, LOW-INCOME, AND MODERATE-INCOME PERSONS SERVED BY EACH ACTIVITY WHERE INFORMATION ON INCOME BY FAMILY SIZE IS REQUIRED TO DETERMINE THE ELIGIBILITY OF THE ACTIVITY.

TABLE 13: PERSONS SERVED BY INCOME

	CDBG Actual Number of Persons Served	HOME Actual Number of Persons Served
Extremely Low-Income	15	0
Low-Income	1,310	3
Moderate Income	0	0
TOTAL	1,325	3

Table 13 – Persons Served by Income

NARRATIVE

Table 13 above, includes the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity. For 2022, three (3) households total were assisted with HOME and/or SHIP funds through housing rehabilitation. Additionally, a total of 1,325 persons were assisted with CDBG funds through housing rehabilitation and related program delivery (29 households), acquisition of the 2920 Lynnhurst Street property for affordable housing (1 household), and street improvements at Coconut Avenue and Central Avenue (2,295 persons). Program delivery for housing rehabilitation included environmental reviews, wage determination research, payroll review, inspections, and monitoring.

CR-25 Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)

EVALUATE THE JURISDICTION'S PROGRESS IN MEETING ITS SPECIFIC OBJECTIVES FOR REDUCING AND ENDING HOMELESSNESS THROUGH: REACHING OUT TO HOMELESS PERSONS (ESPECIALLY UNSHELTERED PERSONS) AND ASSESSING THEIR INDIVIDUAL NEEDS

ESG funds are awarded to Sarasota County directly and reporting on ESG accomplishments is deferred to Sarasota County's CAPER.

The City of Sarasota hired the Florida Housing Coalition (FHC) to evaluate the homeless system in Sarasota. The FHC issued a written report, "Sarasota: Creating an Effective Homeless Crisis Response System" that established recommendations to improve the homeless delivery system. These recommendations were largely implemented, including the restructuring of the Continuum of Care (CoC) Leadership Council, creating a funders group, and the creation of a new Coordinated Entry System.

In 2017, the CoC created the new coordinated entry system, one-by-one. The system was developed with input from the service providers and best practices. Training on the new system began on September 1, 2017, and the system became fully functional on January 1, 2018. Five intake portals were established, and the coordinated entry system is now being used by all providers.

The City of Sarasota has continued to use Homeless Outreach Teams (HOT), comprised of a Police Officer and Case Manager/Worker, to reach out to homeless individuals and families within the City of Sarasota. Additionally, homeless individuals can be directed to services from the street or take advantage of a HOT bed at the Salvation Army. A HOT bed provides each client entry into the Continuum of Care One-by-One Coordinated Entry System, one to seven days of food, shelter, and security, while working with the Case Manager/Worker to develop a plan to end their homelessness. For the City of Sarasota, 331 individuals were served through the HOT beds and HOT staff made contact with 1,279 individuals, although these numbers may include duplications due to multiple contacts). Of those 1,279 individuals, 582 individuals were engaged and were educated on the services available to them, and 510 of those were linked directly to services.

Sarasota County also has a Homeless Outreach Team. The Homeless Outreach Team counts each unique individual one time and, from then on, tracks all contact of the individual. Many homeless individuals are found in encampments in the woods scattered throughout Sarasota County. Clients can then be directed to services or take advantage of one of the HOT beds at the Salvation Army.

For reporting on rapid re-housing and other accomplishments related to homelessness, please defer to Sarasota County's CAPER.

ADDRESSING THE EMERGENCY SHELTER AND TRANSITIONAL HOUSING NEEDS OF HOMELESS PERSONS

Sarasota County works with the Salvation Army and Harvest House to supply emergency shelter and transitional housing beds for homeless individuals and families. For reporting on rapid re-housing and other accomplishments related to homelessness, please defer to Sarasota County's CAPER.

HELPING LOW-INCOME INDIVIDUALS AND FAMILIES AVOID BECOMING HOMELESS, ESPECIALLY EXTREMELY LOW-INCOME INDIVIDUALS AND FAMILIES AND THOSE WHO ARE: LIKELY TO BECOME HOMELESS AFTER BEING DISCHARGED FROM PUBLICLY FUNDED INSTITUTIONS AND SYSTEMS OF CARE (SUCH AS HEALTH CARE FACILITIES, MENTAL HEALTH FACILITIES, FOSTER CARE AND OTHER YOUTH FACILITIES, AND CORRECTIONS PROGRAMS AND INSTITUTIONS); AND, RECEIVING ASSISTANCE FROM PUBLIC OR PRIVATE AGENCIES THAT ADDRESS HOUSING, HEALTH, SOCIAL SERVICES, EMPLOYMENT, EDUCATION, OR YOUTH NEEDS.

Homeless prevention is a major concern and goal of the City of Sarasota. With the strategies outlined in the Consolidated Plan and coordination with Sarasota County as the direct recipient of ESG funding, the City of Sarasota will have supported the efforts of Turning Points and the Suncoast Partnership to End Homelessness, Inc., through this Action Plan program year.

Sarasota has an exceptionally strong homeless prevention system in place, especially for families. In large part funded by private donations, the Season of Sharing and other foundations, nonprofit agencies can respond to families in need quickly and efficiently. The privately funded system has been so successful that the City and County have been able to eliminate their federally funded homeless prevention programs and reallocate those funds to rapid re-housing and related services.

HELPING HOMELESS PERSONS (ESPECIALLY CHRONICALLY HOMELESS INDIVIDUALS AND FAMILIES, FAMILIES WITH CHILDREN, VETERANS AND THEIR FAMILIES, AND UNACCOMPANIED YOUTH) MAKE THE TRANSITION TO PERMANENT HOUSING AND INDEPENDENT LIVING, INCLUDING SHORTENING THE PERIOD OF TIME THAT INDIVIDUALS AND FAMILIES EXPERIENCE HOMELESSNESS, FACILITATING ACCESS FOR HOMELESS INDIVIDUALS AND FAMILIES TO AFFORDABLE HOUSING UNITS, AND PREVENTING INDIVIDUALS AND FAMILIES WHO WERE RECENTLY HOMELESS FROM BECOMING HOMELESS AGAIN

An 80-unit permanent supportive housing complex was completed in 2020 in the City of Sarasota near the intersection of Fruitville Road and Tuttle Avenue. Arbor Village includes 72 one-bedroom units and eight (8) two-bedroom units. All units are for those with special needs, including formerly chronic homeless individuals, those with substance abuse and disabilities, with 50% of all units for homeless and 50% for those with a disabling condition. There are no market rate units unless the tenant has a voucher, and Section 8, VASH, or NED vouchers are accepted. All units are occupied, and the project began accepting tenants near the end of calendar year 2020.

Additionally, the Jewish Family and Children's Services (JFCS) continues to administer a program to assist homeless veterans.

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

ACTIONS TAKEN TO ADDRESS THE NEEDS OF PUBLIC HOUSING.

The Sarasota Housing Authority was awarded funding for the Lofts on Lemon Development, which broke ground in early 2021 and was completed mid-2022. This development opened with 128 units, and 76 will be rented to households with incomes at or below 60% AMI. Fifty-two of these units will be made available to “hometown heroes,” such as educators, first responders, and medical personnel, etc. (whose household incomes may be up to 100% AMI).

The housing authority has about 8 redevelopment, new development, and preservation projects currently in motion. All of these projects support housing for mixed-income units, elderly units, Section 8 units, affordable units, workforce units, LIHTC units, and project-based vouchers. Some of these projects do also have market-rate housing.

In 2021, the Sarasota Housing Authority began construction on the Orange Avenue Phase I development. This application will remove 60 units of public housing and replace them with 84 units, 42 of which will be project-based Section 8, and 42 Low Income Housing Tax Credit units. The financing for the Orange Avenue Phase I development is in place, however construction could not begin until State Historic Preservation Officer signed off on the development. That has now occurred, and the existing tenants are being relocated.

ACTIONS TAKEN TO ENCOURAGE PUBLIC HOUSING RESIDENTS TO BECOME MORE INVOLVED IN MANAGEMENT AND PARTICIPATE IN HOMEOWNERSHIP.

The Sarasota Housing Authority has helped Housing Choice Voucher participants to become more active in their communities and to consider homeownership. The Sarasota Housing Authority coordinates with housing providers, including the Sarasota Housing Funding Corp (SHFC) to develop and/or acquire affordable housing units to lease or sell to low- and very-low-income families. Additionally, the Sarasota Housing Authority offers training, education, and life skills programs to public housing residents and Housing Choice Voucher holders to promote lifelong success, including opportunities for homeownership.

ACTIONS TAKEN TO PROVIDE ASSISTANCE TO TROUBLED PHAS.

Neither the Sarasota Housing Authority nor the Venice Housing Authority is a troubled agency, so no actions have been taken.

DRAFT

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

ACTIONS TAKEN TO REMOVE OR AMELIORATE THE NEGATIVE EFFECTS OF PUBLIC POLICIES THAT SERVE AS BARRIERS TO AFFORDABLE HOUSING SUCH AS LAND USE CONTROLS, TAX POLICIES AFFECTING LAND, ZONING ORDINANCES, BUILDING CODES, FEES AND CHARGES, GROWTH LIMITATIONS, AND POLICIES AFFECTING THE RETURN ON RESIDENTIAL INVESTMENT. 91.220 (J); 91.320 (I)

Public policies can have a direct impact on barriers to affordable housing. The City of Sarasota has recognized this fact and continually reviews its own process to expose any barriers or obstacles to developing affordable housing.

The City of Sarasota, as part of compliance with the State SHIP program, regularly appoints a citizen committee to review public policies that served as barriers to affordable housing. The committee annually examines established policies and procedures, ordinances, land development regulations, and adopted comprehensive plan policies and recommends specific actions or initiatives to encourage or facilitate affordable housing. Those recommendations are presented to the City Commission annually as the Local Housing Incentive Strategies Report, which is adopted as part of the Local Housing Assistance Plan (LHAP) for the SHIP program.

ACTIONS TAKEN TO ADDRESS OBSTACLES TO MEETING UNDERSERVED NEEDS. 91.220(K); 91.320(J)

The identified obstacles to meeting underserved needs are lack of resources and lack of affordable poverty-level rental units for families. These continue to be obstacles and the City of Sarasota is committed to finding the means to overcome these obstacles. Therefore, the City utilizes a diverse pool of funding which are leveraged together in order to serve as many households as possible.

An additional obstacle to meeting underserved needs is the lack of income in the Newtown neighborhood, including public services to meet those needs. In 2017, Sarasota Memorial Hospital (SMH) opened a 6,000-square-foot outpatient clinic for adults in the underserved Newtown neighborhood. The \$2.2 million project is part of Sarasota Memorial Hospital's new internal residency program in partnership with Florida State University College of Medicine. The first 10 residents arrived in the summer of 2017, and the clinic continues to serve as their training ground. The SMH clinic in Newtown provides coordinated care and accessible services to adult patients (18 and older). The clinic

is staffed by resident physicians training under the direct supervision of experienced and Board-certified Internal Medicine physicians. Care includes primary and preventive care services such as: physicals, annual exams and vaccinations; care for chronic conditions such as diabetes, high blood pressure, lupus, thyroid and pulmonary disease; care for acute illness such as flu, pneumonia, ear and fungal infections; and counseling including pharmacy and nutrition.

Another obstacle to meeting the needs of the chronically homeless is the lack of permanent supportive housing and capacity for rapid rehousing. Past City CDBG and SHIP funds were budgeted to create additional scattered site permanent supportive housing units and the Florida Housing Finance Corporation funded a nearly 80-unit permanent supportive housing complex (Arbor Village) that is now complete and occupied. However, permanent supportive housing remains a priority need. The County's ESG funding is now largely focused on rapid re-housing and related services to address that priority need.

ACTIONS TAKEN TO REDUCE LEAD-BASED PAINT HAZARDS. 91.220(K); 91.320(J)

As part of its housing rehabilitation activities, the Sarasota Consortium provides all applicants using both Federal and State rehabilitation funds with a brochure describing the hazards of lead-based paint. Homes built prior to 1978 are inspected for the presence of lead and a risk assessment is conducted as needed. When lead is found, remedial action is taken at no cost to the homeowner.

ACTIONS TAKEN TO REDUCE THE NUMBER OF POVERTY-LEVEL FAMILIES. 91.220(K); 91.320(J)

Most CDBG program funds address the economic needs of low- and moderate-income persons. Many of those programs also address issues such as self-sufficiency, life skill development, and other similar programs that indirectly reduce the number of persons living below the poverty level.

Sarasota has taken action to reduce poverty in the Newtown community with the creation of the North Sarasota Workforce Initiative. This initiative represents a strategic alliance among the City, County, Sarasota School Board, Sarasota Housing Authority, Suncoast Workforce, construction companies, and the community.

The goal is to work together to improve economic development and quality of life throughout the

Newtown-North Sarasota community by creating job and training opportunities for local area residents. Toward this end, the local community has made a commitment to hire local low-income residents on large construction projects, created construction training courses, a business resource center, and even a business entrepreneur training class for low-income residents.

ACTIONS TAKEN TO DEVELOP INSTITUTIONAL STRUCTURE. 91.220(K); 91.320(J)

The City of Sarasota and Sarasota County have formed a consortium (Sarasota Consortium) to jointly administer its CDBG, HOME, ESG and SHIP funding. It works with numerous nonprofit housing providers to develop and rehabilitate housing. Each of the nonprofit providers receive a developer's fee when a home is completed and sold to an eligible buyer to develop administrative capability.

In 2017, Sarasota County hired the Florida Housing Coalition (FHC) to evaluate the homeless system in Sarasota. The FHC issued a written report, "Sarasota: Creating an Effective Homeless Crisis Response System" that established recommendations to improve the homeless delivery system. Many of those recommendations have been implemented, including the restructuring of the CoC Leadership Council, creating and implementing a new Coordinated Entry System. Sarasota County holds monthly meetings and weekly conference calls with the CoC, the City of Sarasota, and funders on the implementation of the plan.

Staff continues to build experience and knowledge through training and program administration. Staff meets periodically to coordinate programming and explore any collaborative initiatives.

ACTIONS TAKEN TO ENHANCE COORDINATION BETWEEN PUBLIC AND PRIVATE HOUSING AND SOCIAL SERVICE AGENCIES. 91.220(K); 91.320(J)

The OHCD continued to coordinate with various community groups to achieve the objectives and goals that have been developed through the public participation process. These groups play a vital role in implementing the Five-Year Consolidated Plan and the Annual Action Plans, Annual Performance Evaluations, and any proposed Substantial Amendments. All stakeholders are welcomed and encouraged to participate in the implementation of the CDBG program.

Sarasota County formed the Human Services Advisory Council (HSAC) to enhance coordination between

social service agencies, including housing agencies. The HSAC meets monthly and brings together agencies, county and municipal representatives and housing agencies to discuss topics of mutual concerns, inform each other of activities that are being undertaken and coordinate service responses. The City of Sarasota is a member of HSAC.

IDENTIFY ACTIONS TAKEN TO OVERCOME THE EFFECTS OF ANY IMPEDIMENTS IDENTIFIED IN THE JURISDICTIONS ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE. 91.520(A)

The Sarasota Consortium provides annual progress reports on the Analysis of Impediments to Fair Housing Choice (AI). Attached to this document is the Analysis of Impediments to Fair Housing Choice (AI) Progress Report through September 30, 2023. Ongoing tasks include annual virtual Fair Housing Seminars, the most recent of which was held on May 18, 2023. The Fair Housing Seminar held on May 18, 2023, had 29 attendees and was conducted by Darren Dante Bonner of the Florida Commission on Human Relations (FCHR). Realtors, community association managers, landlords, public housing authority staff as well as local government staff working on housing-related projects are invited. Also, posters are offered to new sponsors or subrecipients and Fair Housing is an element of all subrecipient agreements. See Attachment 1.

CR-40 Monitoring 91.220 and 91.230

DESCRIBE THE STANDARDS AND PROCEDURES THAT WILL BE USED TO MONITOR ACTIVITIES CARRIED OUT IN FURTHERANCE OF THE PLAN AND WILL BE USED TO ENSURE LONG-TERM COMPLIANCE WITH REQUIREMENTS OF THE PROGRAMS INVOLVED, INCLUDING MINORITY BUSINESS OUTREACH AND COMPREHENSIVE PLANNING REQUIREMENTS.

The OHCD administers the CDBG, HOME and ESG programs on behalf of the City of Sarasota and Sarasota County. OHCD staff is responsible for monitoring Federal requirements including Davis-Bacon, Contract Work Hours, Section 3, Minority Business Enterprise, etc. on an ongoing basis. In addition, programmatic and fiscal requirements are monitored and reviewed by staff.

Most subrecipients are monitored annually by the OHCD staff to ensure compliance with the program requirements of the specific funding source. The City's approach to monitoring is an ongoing process involving continuous communication with and evaluation of grant recipients. Staff also conducted pre-award conferences with subrecipients to ensure that they are aware of program requirements before beginning work on the contract.

The OHCD performed the following monitoring duties:

1. Prepared a detailed subrecipient agreement that describes program requirements as well as a scope of services;
2. Conducted ongoing training on the federal requirements;
3. Notified subrecipients of Federal and State training opportunities;
4. Reviewed all subrecipient's reimbursement requests through desk audits to ensure that specific program requirements are being met;
5. Reviewed the applications and backup documentation of beneficiaries for all housing and homeless activities to ensure that they meet the federal eligibility requirements;
6. Provided ongoing technical assistance; and
7. Conducted onsite monitoring.

The long-term affordability requirements of the HOME program are monitored annually. Staff examined the property appraiser's website to determine if the property remains owned and occupied by the original beneficiary. HOME funds have not been used for rental housing in the past so there has not been a need to monitor leases and property maintenance.

Through the development of the CAPER and Annual Action Plan, OHCD staff can evaluate its progress in meeting the goals and strategies of the Consolidated Plan on an annual basis.

There were 288 tenants living in 94 rental properties originally funded with CDBG, NSP, or SHIP, who were monitored during Federal FY 2022. Most of the non-profit developers provided accurate and timely information. However, OHCD provided considerable technical assistance to one non-profit organization that was not in compliance with the terms of their funding agreements. The rental properties monitored are a combination of single-family houses and multi-family units.

The OHCD inspector completed 51-unit inspections during Federal FY 2022. Such monitoring is conducted to determine if these units remain in compliance with the long-term affordability requirements of the program and are properly maintained, safe, and sanitary. Each of the developments are monitored to ensure compliance with the income requirements and rent restrictions contained in the written agreements.

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

DESCRIPTION OF THE EFFORTS TO PROVIDE CITIZENS WITH REASONABLE NOTICE AND AN OPPORTUNITY TO COMMENT ON PERFORMANCE REPORTS.

The City of Sarasota publicly advertised on November 6, 2023, that the performance report would be available for review and comment. Two (2) public meetings were conducted on November 15, 2023, in City of Sarasota/North County and City of North Port/South County, and the draft report was placed on the OHCD website for 15 days (December 1, 2023, through December 15, 2023). *There were no comments received during the 15-day comment period. As of December 15, 2023, no public comments had been received by the end of the day.*¹

¹ This statement will be updated to reflect the actual outcomes of the 15-day comment period ending on December 15, 2023.

CR-45 CDBG 91.520(c)

SPECIFY THE NATURE OF, AND REASONS FOR, ANY CHANGES IN THE JURISDICTION'S PROGRAM OBJECTIVES AND INDICATIONS OF HOW THE JURISDICTION WOULD CHANGE ITS PROGRAMS AS A RESULT OF ITS EXPERIENCES.

This is the second-year report for the 2021-2025 Consolidated Plan and the priority needs and goals established in that plan are still relevant in the City. The 2021-2025 Consolidated Plan prioritized public input. By utilizing a survey published on both the Sarasota County and City of Sarasota webpages, both English speaking and Spanish speaking individuals were invited to answer questions related to community needs and 191 responses were received. Multiple in-person meetings were held, and written responses were also welcomed. A committee comprised of Sarasota County, City of Sarasota, City of Venice, and City of North Port staff members prioritized the needs and made recommendations to the Sarasota Board of County Commissioners relative to funding of projects. The 2021-2025 Consolidated Plan established new priority needs and goals for the current five-year period.

DOES THIS JURISDICTION HAVE ANY OPEN BROWNFIELDS ECONOMIC DEVELOPMENT INITIATIVE(BEDI) GRANTS?

No.

[BEDI GRANTEES] DESCRIBE ACCOMPLISHMENTS AND PROGRAM OUTCOMES DURING THE LAST YEAR.

Not applicable.

CR-50 HOME 91.520(d)

INCLUDE THE RESULTS OF ON-SITE INSPECTIONS OF AFFORDABLE RENTAL HOUSING ASSISTED UNDER THE PROGRAM TO DETERMINE COMPLIANCE WITH HOUSING CODES AND OTHER APPLICABLE REGULATIONS. PLEASE LIST THOSE PROJECTS THAT SHOULD HAVE BEEN INSPECTED ON-SITE THIS PROGRAM YEAR BASED UPON THE SCHEDULE IN 92.504(D). INDICATE WHICH OF THESE WERE INSPECTED AND A SUMMARY OF ISSUES THAT WERE DETECTED DURING THE INSPECTION. FOR THOSE THAT WERE NOT INSPECTED, PLEASE INDICATE THE REASON AND HOW YOU WILL REMEDY THE SITUATION.

N/A - Sarasota has not funded any rental projects using HOME funds.

AN ASSESSMENT OF THE JURISDICTION'S AFFIRMATIVE MARKETING ACTIONS FOR HOME UNITS. 92.351(B)

The HOME program requires that affirmative marketing steps be used for rental projects containing five (5) or more units. No rental projects were assisted with HOME funds.

OHCD encourages the use of minority and women-owned businesses; however, homeowners are free to select their own contractor to perform rehabilitation work subject to cost reasonableness standards. While OHCD has an Affirmative Marketing Plan, it has not constructed more than five (5) units in one project that would require compliance with this regulation.

DATA ON THE AMOUNT AND USE OF PROGRAM INCOME FOR PROJECTS, INCLUDING THE NUMBER OF PROJECTS AND OWNER AND TENANT CHARACTERISTICS.

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

OTHER ACTIONS TAKEN TO FOSTER AND MAINTAIN AFFORDABLE HOUSING. 91.220(K) (STATES ONLY: INCLUDING THE COORDINATION OF LIHTC WITH THE DEVELOPMENT OF AFFORDABLE HOUSING). 91.320(J)

Public policies can have a direct impact on barriers to affordable housing. The City of Sarasota has recognized this fact and due to recent staff turnover is in the process of reviewing its own policies to expose any barriers or obstacles to developing affordable housing.

CR-58 Section 3

Section 3 projects are housing rehabilitation, housing construction, and other public construction projects assisted under HUD programs that provide housing and community development financial assistance when the total amount of assistance to the project exceeds a threshold of \$200,000.

TABLE 14: SECTION 3

	CDBG	HOME
Total Labor Hours	458.25	0
Qualitative Efforts – Number of Activities by Program	1	0

Table 14 – Section 3

NARRATIVE

CDBG funds were used for a street improvements project along Central Avenue and Cocoanut Avenue. The primary contractor, Spectrum Underground, was provided with forms to complete and for the employees to complete regarding Section 3 eligibility. Eighteen (18) employees completed and returned the forms.

Section 3 forms were also provided to Stripe It Right, Spectrum Underground’s subcontractor. Eighteen (18) employees completed and returned the Section 3 forms. As far as hours are concerned for the Central Avenue/Cocoanut Avenue project, the primary contractor’s employees worked 675.91 regular hours and 108.91 overtime hours on this project, while the subcontractor worked 96 hours of straight time, making the hours worked on the job 771.91 hours of straight time and 108.91 overtime hours, for a total of 880.82 hours. The eighteen (18) Section 3 employees worked 395.82 regular hours and 62.43 hours on the job, for a total of 458.25 hours under Section 3.

Appendix

1. Analysis of Impediments to Fair Housing – Progress Report
2. Financial Reports: CDBG PR-26, HOME PR-33
3. Public Participation
4. Map
5. Financial Reports: CDBG-CV

Analysis of Impediments to Fair Housing – Progress Report

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ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE – PROGRESS REPORT SEPTEMBER 30, 2023

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Increase Homeownership Opportunities Among Minority Households.	Fund a pilot program aimed at providing job training services to residents of public housing and other subsidized housing developments.	OHCD, SHA, Job Training Organizations & Other Affordable Housing Providers	Number of Minority Households Assisted	Complete. There are two redevelopment projects underway in North Sarasota, Lofts on Lemon and Amaryllis Park, both of which focus on trying to incorporate Section 3-eligible individuals into the workforce.
	If funding becomes available, the County should consider reinstating the down payment assistance program and target 20-25% of these funds toward minority households.	OHCD	Funds allocated toward down payment assistance Number of households assisted	Complete.
	Adopt and implement SHA’s draft Section 3 Plan	OHCD	City and County Resolutions adopting Section 3 Policy or other documentation that policy was implemented	Complete – County adopted Section 3 Plan on 6/5/12. City adopted Section 3 Plan on 5/21/12. SHA continues to actively assist HCV holders into homeownership regardless of sex, race, or ethnicity. Over the past three years, 26 households have transitioned from renter to homeowners.
	The City Council should include funding for affordable housing, specifically the SHIP program in its annual list of legislative objectives	OHCD, City of Sarasota & Sarasota County	Number of Minority Households Assisted	Complete.
Increase the Supply of Decent Affordable Housing Throughout the County.	Continue to make affordable housing investments in both impacted and non-impacted areas.	OHCD	Maps highlighting the distribution of affordable housing investments.	Ongoing requirement – Completed for 2022.
	Prepare and adopt a Neighborhood and Site Selection Policy for the HOME Program.	Consortium	Documentation that policy was approved and implemented.	Project has been initiated and applies to newly constructed rental units. It will be completed prior to new rental housing funding.
	Increase existing multi-family requirements from 25 units per acre to 40 units per acre.	Sarasota County	Documentation that the requirement was changed.	Complete – County Planning has determined the concept is not feasible.
Amend SHA Policies and Policy Documents to be in Compliance with all applicable federal laws and authorities.	Develop a Section 504 Needs Assessment and Transition Plan to achieve compliance with accessibility regulations.	SHA	Documentation that needs assessment and transition plan was completed.	Complete. Assessment complete and transition plan complete. The interior of the 5- unit ADA retrofit is going through city inspection and the exterior driveways are next. They were occupied in January 2018.
	Conduct the four-factor analysis to determine the extent to which the	SHA	Results of four-factor analysis.	Successfully completed in April 2021 during FHEO Desk Audit with Fair Housing component.

	translation of vital documents is warranted.			The analysis showed that the most needed translation is Spanish language.
	Engage in programs to expand economic opportunity for LMI Black households, i.e., adopt and implement the draft Section 3 plan that connects public housing residents to jobs, places clients in job training programs provided by SHA or another entity, promotes SHA self-sufficiency programs, and works with local businesses, including the new Walmart to ensure that SHA clients are given priority for job opportunities.	SHA	Number of Black LMI households assisted	Ongoing – SCT is a partner in helping residents obtain their GED which qualifies them for additional jobs. There are two redevelopment projects underway in North Sarasota, Lofts on Lemon and Amaryllis Park, both of which focus on trying to incorporate Section 3-eligible individual into the workforce. In partnership with the Boys and Girls Club, the Sarasota Housing Authority seeks to promote education of children of low-income families on an ongoing basis.
	Conduct an examination of rent reasonableness to ensure that payment standards are consistent with local market trends.	SHA	Documentation that study was completed, and standards adjusted, if applicable.	Complete. The SHA uses a software program that determines rent reasonableness for each unit.
	Amend the grievance policy to specify that SHA will make reasonable accommodations for persons with disabilities.	SHA	Documentation that policy was amended.	Complete – Policy Amended.
Improve processes for allocating and reporting entitlement funds to ensure compliance with applicable laws and regulations.	Initiate a Fair Housing Log to record activities undertaken throughout the year to affirmatively further fair housing.	OHCD	Copy of Fair Housing Log	Ongoing requirement – Completed for 2022 see attached narrative for detail.
	Map the addresses of all new affordable housing investments in CAPER	OHCD	Copy of Map in CAPER	Ongoing requirement – Completed for 2022.
	Amend the HOME Affirmative Marketing Plan so that it also explicitly applies to CDBG- assisted housing with five or more units and add a statement that provides examples of corrective actions that will be pursued if owners do not fulfill requirements.	OHCD	Documentation that amendments to policy were made	Complete.
Support Fair Housing education and outreach programs and conduct real estate testing to reduce housing discrimination.	Continue to advertise the services of the City's Human Relations Board in ways especially directed towards members of the protected classes.	OHCD and HRB	Proof advertisements placed in area media outlets.	Complete.
	Consider revisions to the local fair housing complaints process to remove potential barriers to filling complaints	HRB	Documentation that process was amended, if applicable.	Complete.
	Continue to invest in fair housing education and outreach.	OHCD	Documentation of funds allocated for education and outreach.	Ongoing requirement – Completed for 2022. CDBG Sub- recipient

				<p>Agreements require all subrecipients to place a fair housing poster in lobby. CDBG funds paid to obtain and frame the posters. OHCD held a virtual Fair Housing Seminar on May 18, 2023.</p> <p>Invitations were sent to realtors, community association managers, landlords, and PHA staff, as well as local government staff working on housing-related projects. OCHD continues to promote fair housing by using the logo on all communication, including advertisements, brochures, and letterhead.</p>
	Contract with qualified fair housing organization to conduct real estate testing at least bi-annually. Test for race, disability, and familial status particularly among minority households.	OHCD	Documentation of executed contract and testing results.	Complete.
	Explore the feasibility of forming a bi-county fair housing agency with Manatee County.	OHCD	Sign-in sheets from meetings.	Complete – Manatee County is not interested in pursuing a bi-county fair housing agency.
Ensure the members of the protected classes are represented on appointed boards and commissions dealing with housing issues.	Conduct a study of each of the appointed citizens who are currently members of appointed boards with a housing function to identify members of the protected classes.	City Auditor and Clerk; County Administration	Copy of Survey	Complete.
	Annually schedule a recruitment period for new applicants with an emphasis on outreach to members of the protected classes.	City Auditor and Clerk; County Administration	Documentation of recruitment efforts.	Complete.
Ensure that OHCD's LAP complies with all applicable laws and regulations.	Revise the LAP to include more detailed information including points of contact in the County, what agencies and staff members are bilingual and can provide interpreter services and who is eligible and qualified to interpret.	OHCD	Copy of Revised LAP	Successfully completed in April 2021 during FHEO Desk Audit with Fair Housing component.
Ensure that local zoning ordinances are in compliance with the Fair Housing Act.	Voluntarily maintain the new procedure that was established under the DOJ settlement for handling request for determining which properties are community residential homes	Sarasota County	Documentation that procedure was maintained.	Complete. The DOJ settlement terminated in 2007, and the Zoning Regulations removed the separation requirements. The semi-annual reporting requirement for the duration of the settlement agreement (2007-2011) was completed.

	The County, the City of Venice and the City of North Port should amend their respective	Sarasota County, City of North Port and City of Venice	Documentation that zoning ordinances were amended.	Sarasota and Venice are complete. Locational restrictions are being removed via a special
	zoning ordinances to remove locational restrictions on group homes.			text amendment in North Port. Currently, the locational restriction is not being reinforced. Pending updated information.
	Refer complaints of false advertising by non-registered communities to an investigatory agency such as HUD or FCHR.	OHCD, City of Sarasota, Sarasota County, City of North Port and City of Venice	Documentation of referral process.	Ongoing requirement – Complete for 2022. Discriminatory Craigslist rental ad reported to HUD through their website.
Increase access to public transit options for minority and LMI households.	Provide SCAT with the local financial assistance needed to meet its system transformational goals.	Sarasota County	Documentation of funds provided to SCAT.	Complete. The number of routes serving protected classes was increased.
	Local jurisdictions should implement the established action steps as outlined in their respective comprehensive plans to prioritize transit-oriented development as a means of providing affordable housing with access to employment centers, services, and amenities.	City of Sarasota, Sarasota County, City of North Port and City of Venice	Documentation that action steps were taken.	Complete for 2022. The City of Sarasota hired a consultant to update the zoning code and a review of the density along transit routes will be a part of that study.
Increase and enhance fair housing outreach and education efforts throughout the County.	Investigate the feasibility of contracting for mortgage testing in the County. If possible, contract with an experienced firm to conduct such testing.	OHCD, City of Sarasota & Sarasota County	Documentation of feasibility analysis and copy of executed contract, if applicable.	Completed – Annual testing was not determined to be fiscally feasible.
	Encourage HUD-approved homebuyer counseling providers to continue this invaluable service for lower income and minority households.	OHCD, City of Sarasota & Sarasota County	Sign-in sheets from homebuyer counseling sessions.	Ongoing requirement – Completed for 2022. e.g., Goodwill previously received a grant for homebuyer education.
Eliminate discriminatory language in real estate advertisements.	Write letters to local newspaper editors informing them of their fair housing obligations as they relate to real estate advertising.	OHCD and HRB	Copies of letters mailed to local newspapers.	Complete.

Analysis of Impediments to Fair Housing Choice – Progress Report September 30, 2023

Note: In 2023, the Office of Housing and Community Development worked with Darren Dante Bonner of the Florida Commission on Human Relations (FCHR) to handle in-person fair housing training in Sarasota for the benefit of the public, landlords, property managers, and government and Public Housing Authority employees. Previously, a Spanish-speaking service coordinator was hired by the Sarasota Housing Authority at McCown Towers, a public housing apartment complex and the Sarasota Housing Authority partnered with the local CoC and other service agencies in outreach, encouraging those who may not otherwise apply for housing assistance to do so.

Financial Reports: CDBG PR-26, HOME PR-33

DRAFT



PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	716,033.73
02 ENTITLEMENT GRANT	397,738.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	18,891.66
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	1,132,663.39

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	363,930.75
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	(52,196.85)
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	311,733.90
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	119,546.28
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	(43,547.52)
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	387,732.66
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	744,930.73

PART III: LOW/MOD BENEFIT THIS REPORTING PERIOD

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	363,930.75
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	363,930.75
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	116.74%

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: PY: PY:
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	0.00
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	0.00
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	0.00
32 ENTITLEMENT GRANT	397,738.00
33 PRIOR YEAR PROGRAM INCOME	8,971.00
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	406,709.00
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	0.00%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	119,546.28
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	(43,547.52)
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	75,998.76
42 ENTITLEMENT GRANT	397,738.00
43 CURRENT YEAR PROGRAM INCOME	18,891.66
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	416,629.66
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	18.24%

LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17

No data returned for this view. This might be because the applied filter excludes all data.

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

No data returned for this view. This might be because the applied filter excludes all data.

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	2	2014	6692321	Acquisition-2920 Lynnhurst	01	LMH	\$500.71
					01	Matrix Code	\$500.71
2021	4	2017	6756733	2022-23 Coconut/Central Street Improvements	03K	LMA	\$150,506.39
2021	4	2017	6785503	2022-23 Coconut/Central Street Improvements	03K	LMA	\$112,978.29
2021	4	2017	6829285	2022-23 Coconut/Central Street Improvements	03K	LMA	\$111.36
					03K	Matrix Code	\$263,596.04
2018	2	2006	6693072	2019/20 CDBG Program Delivery	14H	LMH	\$50,985.88
2020	1	2012	6693072	2019/20 CDBG Program Delivery	14H	LMH	\$710.26
2021	3	2019	6756733	2021/22 CDBG Program Delivery	14H	LMH	\$48,137.86
					14H	Matrix Code	\$99,834.00
Total							\$363,930.75

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

No data returned for this view. This might be because the applied filter excludes all data.

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2021	5	2005	6693072	2021/22 CDBG Administration	21A		\$43,547.52
2022	6	2018	6756733	2022/23 CDBG Administration	21A		\$36,828.93
2022	6	2018	6785503	2022/23 CDBG Administration	21A		\$39,169.83
					21A	Matrix Code	\$119,546.28
Total							\$119,546.28

U.S. Department of Housing and Urban Development
Office of Community Planning and Development
Integrated Disbursement and Information System
Home Matching Liability Report

DATE: 11-20-23
TIME: 11:29
PAGE: 1

SARASOTA, FL

FiscalYear	MatchPercent	TotalDisbursements	PaymentsRequiring Match	Unmet LiabilityAmount
1998	25.0 %	\$278,810.47	\$278,810.47	\$69,702.61
1999	25.0 %	\$942,242.41	\$759,977.30	\$189,994.32
2000	25.0 %	\$901,173.89	\$814,418.85	\$203,604.71
2001	25.0 %	\$135,675.97	\$130,184.60	\$32,546.15
2002	25.0 %	\$509,501.64	\$455,038.50	\$113,759.62
2003	25.0 %	\$390,000.00	\$390,000.00	\$97,500.00
2004	0.0 %	\$570,650.34	\$416,350.34	\$0.00
2005	25.0 %	\$1,415,554.00	\$1,295,572.97	\$323,893.24
2006	0.0 %	\$1,744,255.88	\$1,744,255.88	\$0.00
2007	25.0 %	\$1,567,259.22	\$1,118,279.65	\$279,569.91
2008	25.0 %	\$1,407,931.53	\$1,407,931.53	\$351,982.88
2009	25.0 %	\$873,630.00	\$873,630.00	\$218,407.50
2011	25.0 %	\$1,053,283.25	\$1,033,283.25	\$258,320.81
2012	25.0 %	\$796,149.42	\$776,149.42	\$194,037.35
2013	25.0 %	\$754,722.41	\$599,022.42	\$149,755.60
2014	25.0 %	\$1,087,683.22	\$1,015,484.31	\$253,871.07
2015	25.0 %	\$808,042.40	\$685,489.72	\$171,372.43
2016	25.0 %	\$829,295.93	\$829,295.93	\$207,323.98
2017	0.0 %	\$436,000.65	\$368,600.95	\$0.00
2018	0.0 %	\$123,618.99	\$35,047.89	\$0.00
2019	25.0 %	\$135,851.40	\$0.00	\$0.00
2020	25.0 %	\$747,345.21	\$690,496.71	\$172,624.17
2021	25.0 %	\$1,463,657.69	\$1,463,657.69	\$365,914.42
2022	25.0 %	\$152,708.20	\$75,000.00	\$18,750.00

HOME Match Report

Match Contributions for Federal Fiscal Year (yyyy) 2022

Part I Participant Identification

1. Participant No. (assigned by HUD) M-18-DC-12-0219		2. Name of the Participating Jurisdiction Sarasota Consortium		3. Name of Contact (person completing this report) Cindy Emshoff	
5. Street Address of the Participating Jurisdiction 111 South Orange Avenue				4. Contact's Phone Number (include area code) 9419513605	
6. City Sarasota	7. State FL	8. Zip Code 34236			

Part II Fiscal Year Summary

1. Excess match from prior Federal fiscal year	\$	597618.60	
2. Match contributed during current Federal fiscal year (see Part III.9.)	\$	113764.35	
3. Total match available for current Federal fiscal year (line 1 + line 2)			\$ 711382.95
4. Match liability for current Federal fiscal year			\$ 18750.00
5. Excess match carried over to next Federal fiscal year (line 3 minus line 4)			\$ 692632.95

Part III Match Contribution for the Federal Fiscal Year

1. Project No. or Other ID	2. Date of Contribution (mm/dd/yyyy)	3. Cash (non-Federal sources)	4. Foregone Taxes, Fees, Charges	5. Appraised Land / Real Property	6. Required Infrastructure	7. Site Preparation, Construction Materials, Donated labor	8. Bond Financing	9. Total Match
Janet Fennessey	06/23/2023	51637.19						51637.19
Marsha Spurlock	03/24/2023	19089.97						19089.97
Peter Linderman	09/13/2023	43037.19						43037.19

Name of the Participating Jurisdiction								Federal Fiscal Year (yyyy)
--	--	--	--	--	--	--	--	----------------------------

1. Project No. or Other ID	2. Date of Contribution (mm/dd/yyyy)	3. Cash (non-Federal sources)	4. Foregone Taxes, Fees, Charges	5. Appraised Land / Real Property	6. Required Infrastructure	7. Site Preparation, Construction Materials, Donated labor	8. Bond Financing	9. Total Match

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

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

Instructions for the HOME Match Report

Applicability:

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

Timing:

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

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

The participating jurisdiction also keeps a copy.

Instructions for Part II:

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

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

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

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

Instructions for Part III:

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

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

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

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

2. **Date of Contribution:** Enter the date of contribution. Multiple entries may be made on a single line as long as the contributions were made during the current fiscal year. In such cases, if the contributions were made at different dates during the year, enter the date of the last contribution.
3. **Cash:** Cash contributions from non-Federal resources. This means the funds are contributed permanently to the HOME Program regardless of the form of investment the jurisdiction provides to a project. Therefore all repayment, interest, or other return on investment of the contribution must be deposited in the PJ’s HOME account to be used for HOME projects. The PJ, non-Federal public entities (State/local governments), private entities, and individuals can make contributions. The grant equivalent of a below-market interest rate loan to the project is eligible when the loan is not repayable to the PJ’s HOME account. [§92.220(a)(1)] In addition, a cash contribution can count as match if it is used for eligible costs defined under §92.206 (except administrative costs and CHDO operating expenses) or under §92.209, or for the following non-eligible costs: the value of non-Federal funds used to remove and relocate ECHO units to accommodate eligible tenants, a project reserve account for replacements, a project reserve account for unanticipated increases in operating costs, operating subsidies, or costs relating to the portion of a mixed-income or mixed-use project not related to the affordable housing units. [§92.219(c)]
4. **Foregone Taxes, Fees, Charges:** Taxes, fees, and charges that are normally and customarily charged but have been waived, foregone, or deferred in a manner that achieves affordability of the HOME-assisted housing. This includes State tax credits for low-income housing development. The amount of real estate taxes may be based on the

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

5. **Appraised Land/Real Property:** The appraised value, before the HOME assistance is provided and minus any debt burden, lien, or other encumbrance, of land or other real property, not acquired with Federal resources. The appraisal must be made by an independent, certified appraiser. [§92.220(a)(3)]
6. **Required Infrastructure:** The cost of investment, not made with Federal resources, in on-site and off-site infrastructure directly required for HOME-assisted affordable housing. The infrastructure must have been completed no earlier than 12 months before HOME funds were committed. [§92.220(a)(4)]
7. **Site preparation, Construction materials, Donated labor:** The reasonable value of any site-preparation and construction materials, not acquired with Federal resources, and any donated or voluntary labor (see §92.354(b)) in connection with the site-preparation for, or construction or rehabilitation of, affordable housing. The value of site-preparation and construction materials is determined in accordance with the PJ’s cost estimate procedures. The value of donated or voluntary labor is determined by a single rate (“labor rate”) to be published annually in the Notice Of Funding Availability (NOFA) for the HOME Program. [§92.220(6)]
8. **Bond Financing:** Multifamily and single-family project bond financing must be validly issued by a State or local government (or an agency, instrumentality, or political subdivision thereof). 50% of a loan from bond proceeds made to a multifamily affordable housing project owner can count as match. 25% of a loan from bond proceeds made to a single-family affordable housing project owner can count as match. Loans from all bond proceeds, including excess bond match from prior years, may not exceed 25% of a PJ’s total annual match contribution. [§92.220(a)(5)] The amount in excess of the 25% cap for bonds may carry over, and the excess will count as part of the statutory limit of up to 25% per year. Requirements regarding

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

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

Ineligible forms of match include:

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

Public Participation

DRAFT

- Human Resources
- Information Technology
- Office of Housing and Community Development**
 - Barrier Removal
 - Bulletins
 - Community Development Block Grant
 - Down Payment Assistance
 - Home Repair Programs
 - Homeless Services
 - + Housing Resources
 - + Neighborhood Stabilization Programs
 - Rental Programs
 - Utility Connections
- + Planning
- Police Department
- + Utilities
- + Special Districts
- Staff Directory
- + Public Works

**Federal FY2022 Consolidated Annual Performance and Evaluation Report
Community Meetings & Comment Periods**

The City of Sarasota is preparing the annual Consolidated Annual Performance and Evaluation Report (CAPER) which summarizes their accomplishments for the year ending September 30, 2023. Two meetings will be held to receive public input on the prior year's performance. These meetings will be held on:

November 15, 2023 - 10:30 a.m.

SRQ Media Center - 1565 First Street, Sarasota, Florida 34236

November 15, 2023 - 2:30 p.m.

North Port Library - 13800 S. Tamiami Trail, North Port, Florida 34287

A draft copy of the CAPER will be prepared for public comment. The draft CAPER will be placed on the Office of Housing and Community Development websites at the following locations:

www.sarasotaf1.gov/government/office-of-housing-and-community-development

www.scgov.net/government/office-of-housing-and-community-development

Written comments on the CAPER may be submitted to the Office of Housing and Community Development, 111 South Orange Avenue, Sarasota, Florida 34236 or by e-mail to: 2022-23CAPERComments@sarasotaf1.gov All comments are due no later than 5:00 pm on December 15, 2023.

Herald-Tribune

Originally published at heraldtribune.com on 11/06/2023

**Federal FY2022 Consolidated Annual Performance
and Evaluation Report
Community Meetings & Comment Periods**

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www.sarasotafl.gov/government/office-of-housing-and-community-development

www.scgov.net/government/office-of-housing-and-community-development

Written comments on the CAPER may be submitted to the Office of Housing and Community Development, 111 South Orange Avenue, Sarasota, Florida 34236 or by e-mail to:

2022-23CAPERComments@sarasotafl.gov All comments are due no later than 5:00 pm on December 15, 2023.



2022-2023 Consolidated Annual Performance Evaluation Report

Public Meeting

SRQ Media Center - November 15, 2023 10:30 a.m. - 11:30 a.m.

NAME	PHONE	EMAIL ADDRESS
NO ATTENDEES		

2022-2023 Consolidated Annual Performance Evaluation Report

Public Meeting

North Port Library - November 15, 2023 2:30 p.m. - 3:30 p.m.

NAME	PHONE	EMAIL ADDRESS
<i>NO ATTENDEES</i>		

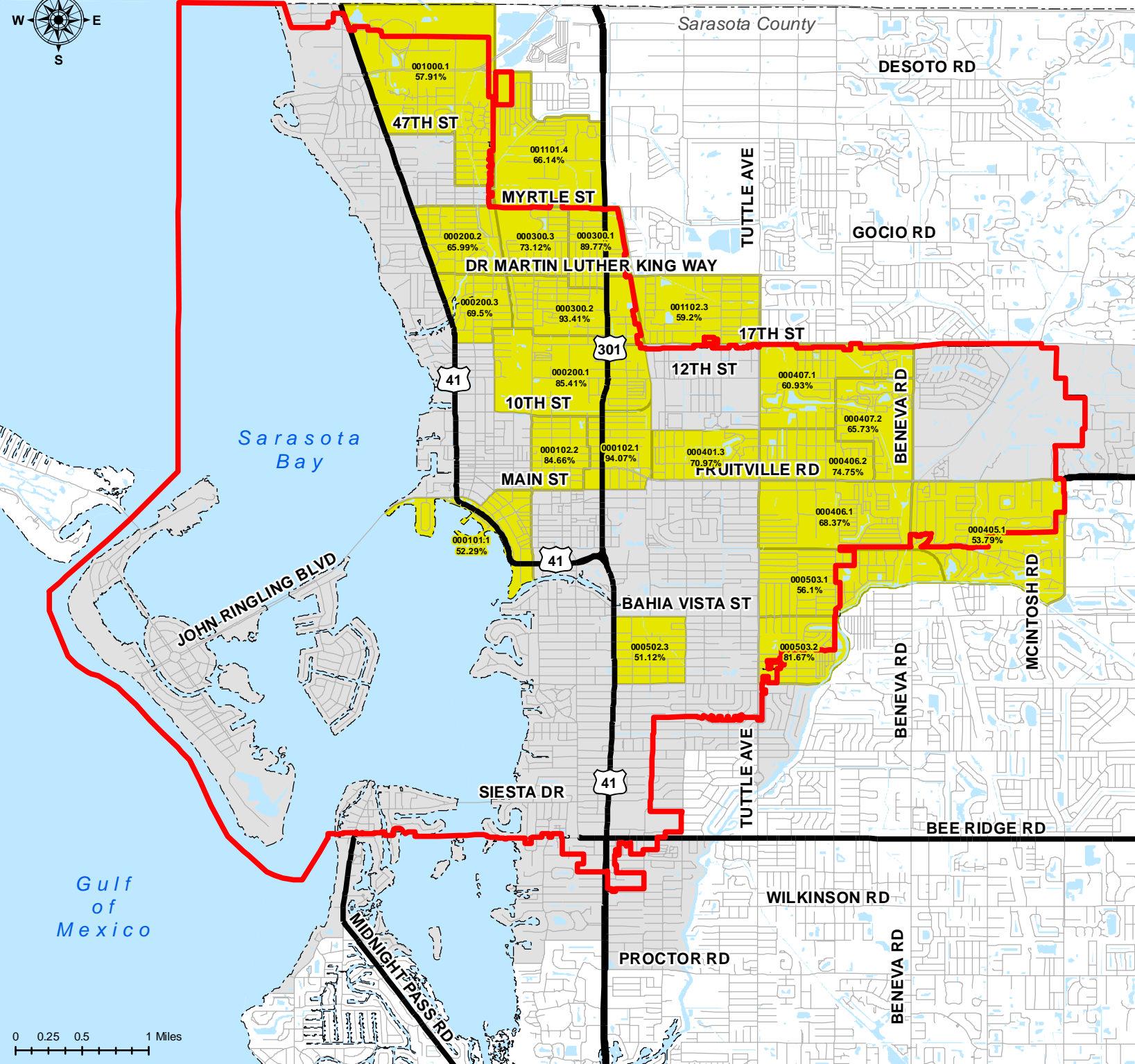
Map

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Manatee County
Sarasota County

CITY OF SARASOTA FY 2021 Low and Moderate Income Block Groups



Legend

- City Limits
- County Boundary

Roadways

Description

- Highways
- Streets
- Water Bodies

City LMISD by Block Group

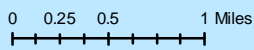
- Less than 51%
- 51% or more



Office of Housing & Community Development
111 S. Orange Avenue
Sarasota, Florida 34236
(941) 951-3640

"Low/Moderate Income Block Groups" are block groups where 51% or more of the population is low and moderate income according to HUD FY 2021 Income Limits.

Source: U.S. Department of Housing & Urban Development, FY 2021 CDBG Low Mod Income Summary Data (LMISD) based on the ACS 5-Year 2011-2015 Low and Moderate Income Summary Data.



Financial Reports: CDBG-CV

DRAFT



PART I: SUMMARY OF CDBG-CV RESOURCES

01 CDBG-CV GRANT	714,628.00
02 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
03 FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
04 TOTAL CDBG-CV FUNDS AWARDED	714,628.00

PART II: SUMMARY OF CDBG-CV EXPENDITURES

05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	571,704.00
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	0.00
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	571,704.00
09 UNEXPENDED BALANCE (LINE 04 - LINE8)	142,924.00

PART III: LOWMOD BENEFIT FOR THE CDBG-CV GRANT

10 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
11 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
12 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	571,704.00
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	571,704.00
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	571,704.00
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	100.00%

PART IV: PUBLIC SERVICE (PS) CALCULATIONS

16 DISBURSED IN IDIS FOR PUBLIC SERVICES	571,704.00
17 CDBG-CV GRANT	714,628.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	80.00%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	0.00
20 CDBG-CV GRANT	714,628.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	0.00%

LINE 10 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 10

No data returned for this view. This might be because the applied filter excludes all data.

LINE 11 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 11

No data returned for this view. This might be because the applied filter excludes all data.

LINE 12 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 12

Plan Year	IDIS Project	IDIS Activity	voucher Number	Activity Name	matrix Code	National Objective	Drawn Amount
2020	6	2015	6693320	Child Care-Boys and Girls Club (CDBG-CV)	05L	LMC	\$49,660.00
			6716705	Child Care-Boys and Girls Club (CDBG-CV)	05L	LMC	\$93,266.00
		2016	6716717	Food Distribution-All Faiths Food Bank (CDBG-CV)	05W	LMC	\$111,244.66
			6739587	Food Distribution-All Faiths Food Bank (CDBG-CV)	05W	LMC	\$31,681.34
		2020	6824135	Child Care-Children First (CDBG-CV)	05L	LMC	\$266,071.20
			6829307	Child Care-Children First (CDBG-CV)	05L	LMC	\$19,780.80
Total							\$571,704.00

LINE 16 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 16

Plan Year	IDIS Project	IDIS Activity	voucher Number	Activity Name	matrix Code	National Objective	Drawn Amount
2020	6	2015	6693320	Child Care-Boys and Girls Club (CDBG-CV)	05L	LMC	\$49,660.00
			6716705	Child Care-Boys and Girls Club (CDBG-CV)	05L	LMC	\$93,266.00

2016	6716717	Food Distribution-All Faiths Food Bank (CDBG-CV)	05W	LMC	\$111,244.66
	6739587	Food Distribution-All Faiths Food Bank (CDBG-CV)	05W	LMC	\$31,681.34
2020	6824135	Child Care-Children First (CDBG-CV)	05L	LMC	\$266,071.20
	6829307	Child Care-Children First (CDBG-CV)	05L	LMC	\$19,780.80
Total					\$571,704.00

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

No data returned for this view. This might be because the applied filter excludes all data.

IDIS - PR05

U.S. Department of Housing and Urban Development
Office of Community Planning and Development
Integrated Disbursement and Information System
Drawdown Report by Project and Activity
SARASOTA , FL

DATE: 11-20-23
TIME: 15:09
PAGE: 1

CITY CDBG_CV

REPORT FOR PROGRAM : CDBG-CV
PGM YR : ALL
PROJECT : ALL
ACTIVITY : ALL

Program Year/ Project	IDIS Act ID	Activity Name	Prior Year	Voucher Number	Line Item	Voucher Status	LOCCS Send Date	Grant Year	Grant Number	Fund Type	Drawn Amount
2020 6 CV-Public Services	2015	Child Care-Boys and Girls Club (CDBG-CV)		6693320	1	Completed	10/20/2022	2020	B20MW120018	EN	\$49,660.00
			Y	6716705	1	Completed	12/28/2022	2020	B20MW120018	EN	\$93,266.00
					Activity Total						\$142,926.00
2020 6 CV-Public Services	2016	Food Distribution-All Faiths Food Bank (CDBG-CV)		6716717	1	Completed	12/28/2022	2020	B20MW120018	EN	\$111,244.66
				6739587	1	Completed	3/7/2023	2020	B20MW120018	EN	\$31,681.34
					Activity Total						\$142,926.00
2020 6 CV-Public Services	2020	Child Care-Children First (CDBG-CV)		6824135	1	Completed	10/13/2023	2020	B20MW120018	EN	\$266,071.20
				6829307	1	Completed	10/25/2023	2020	B20MW120018	EN	\$19,780.80
					Activity Total						\$285,852.00
										Project Total	\$571,704.00
										Program Year 2020 Total	\$571,704.00