Welcome to the Public Hearing for the 2021-2022 Consolidated Annual Performance and Evaluation Report (CAPER)

Monday, June 20, 2022
2:00 p.m. – 3:00 p.m.
Sponsored by the Montana Departments of Commerce and Health and Human Services

The Department of Commerce will make reasonable accommodations for persons with disabilities or persons with limited English proficiency who wish to participate in this process and need an alternative accessible format of the presentation materials or translation services.

El Departamento de Comercio hará adaptaciones razonables para las personas con discapacidades o personas con dominio limitado del inglés que deseen participar en este proceso y necesiten un formato accessible alternativo de materiales de presentación o servicios de traducción.
2021-2022 CAPER
Public Participation Process

The State of Montana, through the Department of Commerce (Commerce) and Department of Public Health and Human Services (DPHHS), develops a 5-year plan to guide policy and investment for housing, infrastructure, economic, and other community development needs.

The 5-year plan, known as the “Consolidated Plan for Housing and Community Development” is required by the U.S. Department of Housing and Urban Development (HUD) to assess Montana’s needs and current conditions as well as to determine priorities and allocate HUD Community Planning and Development (CPD) funding.
2021-2022 CAPER
Public Participation Process

The perspectives and opinions shared by participants of this public hearing will help Commerce and DPHHS to edit and finalize the Draft 2021-2022 CAPER, which falls under the 2020-2024 Consolidated Plan. We hope that with your input, we can ensure community development needs across Montana are identified and addressed.
2020-2024 Consolidated Plan Goals and Objectives

• The objectives of Montana’s Consolidated Plan include:
  – Provide decent housing
  – Provide a suitable living environment
  – Expand economic opportunities

• The goals of Montana’s Consolidated Plan are:
  – Goal 1 – Preserve and Construct Affordable Housing
  – Goal 2 – Plan for Communities
  – Goal 3 – Improve and Sustain Public Infrastructure
  – Goal 4 – Revitalize Local Economies
  – Goal 5 – Reduce Homelessness
2020-2024 Consolidated Plan Programs

- **Community Development Block Grant (CDBG)**
  - Housing (Rental Development / Single Family Rehabilitation)
  - Public and Community Facilities
  - Economic Development
  - Planning
- **HOME Investment Partnerships Program (HOME)**
  - Rental Development / Single Family Development / Rental Rehabilitation
  - Homebuyer Assistance
- **Housing Trust Fund (HTF)**
  - Rental Development / Single Family Development / Rental Rehabilitation
- **Emergency Solutions Grant (ESG)**
  - Emergency Shelter / Homelessness Prevention / Rapid Re-housing
- **Housing Opportunities for Persons with AIDS (HOPWA)**
  - For more information on Montana’s competitive HOPWA grant, please contact Julianna Campbell at Julianna.Campbell@mt.gov
2020-2024 Consolidated Plan Documents

• 5-Year Consolidated Plan for Housing and Community Development (Con Plan)
  – Consolidated Plans are strategic plans that guide housing and community investments.
  – Montana is currently operating under the 2020-2024 Consolidated Plan.

• Annual Action Plan (AAP)
  – AAPs are prepared each year of the Consolidated Plan and outline specific activities, goals, and objectives for the given program year.

• Consolidated Annual Performance and Evaluation Report (CAPER)
  – CAPERs are annual reports that detail use of funds and progress towards meeting goals and objectives for AAPs.
  – Montana’s 2021-2022 CAPER reports on activities for Program Year 2 of the 2020-2024 Consolidated Plan, which runs from April 1, 2021 to March 31, 2022.
# 2021-2022 CAPER Funding Allocations & Awards

## Plan Year 2 Funding Allocations

<table>
<thead>
<tr>
<th>Program</th>
<th>Preserve and Construct Affordable Housing</th>
<th>Plan for Communities</th>
<th>Improve and Sustain Vital Public Infrastructure</th>
<th>Revitalize Local Economies</th>
<th>Reduce Homelessness</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDBG</td>
<td>$750,000</td>
<td>$500,000</td>
<td>$2,787,190</td>
<td>$2,000,000</td>
<td>$450,000</td>
<td>$303,727</td>
</tr>
<tr>
<td>CDBG-CV</td>
<td>$2,035,000</td>
<td>$0</td>
<td>$5,087,340</td>
<td>$0</td>
<td>$1,017,000</td>
<td>$2,034,835</td>
</tr>
<tr>
<td>HOME</td>
<td>$2,131,411</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$650,000</td>
<td>$309,045</td>
</tr>
<tr>
<td>ESG</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$687,765</td>
<td>$55,764</td>
</tr>
<tr>
<td>HTF</td>
<td>$2,041,696</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$750,000</td>
<td>$310,188</td>
</tr>
</tbody>
</table>

## Plan Year 2 Awards

<table>
<thead>
<tr>
<th>Program</th>
<th>Preserve and Construct Affordable Housing</th>
<th>Plan for Communities</th>
<th>Improve and Sustain Vital Public Infrastructure</th>
<th>Revitalize Local Economies</th>
<th>Reduce Homelessness</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDBG</td>
<td>$1,566,117</td>
<td>$653,500</td>
<td>$3,000,000</td>
<td>$0</td>
<td>$0</td>
<td>N/A</td>
</tr>
<tr>
<td>CDBG-CV</td>
<td>$3,631,240</td>
<td>$0</td>
<td>$3,465,558</td>
<td>$0</td>
<td>$2,372,687</td>
<td>$300,000</td>
</tr>
<tr>
<td>HOME</td>
<td>$1,919,704</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$687,765</td>
<td>$14%</td>
</tr>
<tr>
<td>ESG</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$687,765</td>
<td>$100%</td>
</tr>
<tr>
<td>HTF</td>
<td>$1,691,696</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$1,400,000</td>
<td>$45%</td>
</tr>
</tbody>
</table>
2021-2022 CAPER
Grants Awarded

• CDBG: 32 projects - $5,219,617 awarded
  – Housing: 3 projects – $1,566,117 awarded
  – Public Facilities: 3 projects – $1,800,000 awarded
  – Community Facilities: 2 projects – $1,200,000 awarded
  – Economic Development: 0 projects – $0 awarded
  – Planning: 23 projects – $653,500 awarded

• CDBG-CV: 16 projects – $6,003,927 awarded

• HOME: 5 projects – $2,219,704 awarded

• HTF: 5 projects – $3,091,696 awarded

• ESG: $687,765 awarded to 9 of the 10 HRDCs via formula grants
2021-2022 CAPER
Goals and Outcomes

• CDBG, HOME, HTF, and ESG expended a total of $16,423,110 in Program Year 2
• CDBG expended $5,548,695, HOME expended $5,152,215, HTF expended $5,665,697, and ESG expended $56,503

<table>
<thead>
<tr>
<th>Program</th>
<th>Preserve and Construct Affordable Housing</th>
<th>Plan for Communities</th>
<th>Improve and Sustain Vital Public Infrastructure</th>
<th>Revitalize Local Economies</th>
<th>Reduce Homelessness</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDBG &amp; CDBG-CV</td>
<td>$207,454</td>
<td>$713,771</td>
<td>$3,856,983</td>
<td>$300,000</td>
<td>$0</td>
<td>$556,656</td>
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<tr>
<td>HOME</td>
<td>$4,751,642</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$400,573</td>
</tr>
<tr>
<td>ESG</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$4,544</td>
</tr>
<tr>
<td>HTF</td>
<td>$5,231,196</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$150,000</td>
<td>$284,501</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$10,190,292</td>
<td>$713,771</td>
<td>$3,856,983</td>
<td>$300,000</td>
<td>$201,959</td>
<td>$1,074,949</td>
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</table>
# 2021-2022 CAPER Goals and Outcomes

## Goals and Outcomes Table

<table>
<thead>
<tr>
<th>Goal</th>
<th>Indicator</th>
<th>Unit of Measure</th>
<th>All Program Years (To Date)</th>
<th>Current Program Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Expected – Strategic Plan</td>
<td>Actual – Strategic Plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Expected – Program Year</td>
<td>Actual – Program Year</td>
</tr>
<tr>
<td>Preserve and Construct Affordable Housing</td>
<td>Rental units constructed</td>
<td>Household Housing Unit</td>
<td>60</td>
<td>59</td>
</tr>
<tr>
<td></td>
<td>Rental units rehabilitated</td>
<td>Household Housing Unit</td>
<td>130</td>
<td>158</td>
</tr>
<tr>
<td></td>
<td>Homeowner Housing Added</td>
<td>Household Housing Unit</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Homeowner Housing Rehabilitated</td>
<td>Household Housing Unit</td>
<td>15</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Direct Financial Assistance to Homebuyers</td>
<td>Households Assisted</td>
<td>250</td>
<td>43</td>
</tr>
<tr>
<td>Plan for Communities</td>
<td>Other</td>
<td>Local Governments Assisted</td>
<td>75</td>
<td>45</td>
</tr>
<tr>
<td>Improve and Sustain Public Infrastructure</td>
<td>Public Facility or Infrastructure Activities Other than Low/ Moderate Income Housing Benefit</td>
<td>Persons Assisted</td>
<td>5,000</td>
<td>11,004</td>
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<tr>
<td></td>
<td>Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit</td>
<td>Households Assisted</td>
<td>100</td>
<td>0</td>
</tr>
<tr>
<td>Revitalize Local Economies</td>
<td>Façade treatment / business building rehabilitation</td>
<td>Businesses</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Jobs created / retained</td>
<td>Jobs</td>
<td>250</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td>Businesses assisted</td>
<td>Businesses Assisted</td>
<td>20</td>
<td>2</td>
</tr>
<tr>
<td>Reduce Homelessness</td>
<td>Tenant-based rental assistance / Rapid Rehousing</td>
<td>Households Assisted</td>
<td>1,000</td>
<td>121</td>
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<tr>
<td></td>
<td>Homeless Person Overnight Shelter</td>
<td>Persons Assisted</td>
<td>400</td>
<td>410</td>
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<tr>
<td></td>
<td>Homelessness Prevention</td>
<td>Persons Assisted</td>
<td>2,400</td>
<td>192</td>
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<tr>
<td></td>
<td>Housing for Homeless added</td>
<td>Household Housing Unit</td>
<td>100</td>
<td>56</td>
</tr>
</tbody>
</table>
2021-2022 CAPER Monitoring

- **Project Completion Monitoring**
  - CDBG – 6 projects
  - CDBG-CV – 1 project
  - HOME – 6 projects
  - HTF – 4 projects

- **Construction Progress Monitoring**
  - HOME – 2 projects
  - HTF – 4 projects

- **Period of Affordability (POA) Monitoring**
  - HOME – 8 projects
  - HTF – 0 projects (no projects are 12 months past completion)

- **ESG Monitoring**
  - All 9 ESG subrecipients were monitored with virtual visits and desk monitoring
2021-2022 CAPER Document Review

• 2021-2022 CAPER is available:
  – On Commerce’s website: https://commerce.mt.gov/Consolidated-Plan/Documents
  – At several depositories throughout the state (see website for list)
  – By request
2022-2023 AAP
Initial Input

• Commerce and DPHHS are developing the 2022-2023 Annual Action Plan (AAP) that covers April 1, 2022 – March 31, 2023.

• HUD’s CPD Allocations for Plan Year 3
  – CDBG: $6,537,201
  – HOME: $3,420,477
  – HTF: $2,982,433
  – ESG: $741,906

• Initial input on the way Commerce and DPPHS should utilize these funds to meet community development needs across Montana is encouraged during the public comment period

• The Draft 2022-2023 AAP will be released on July 5, 2022 and there will be a public hearing on July 21, 2022 for further input.
2021-2022 CAPER
Contact Information

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Administrator (Community MT): Renee Lemon
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TDD: 406.841.2702
Fax: 406.841.2771
Email: DOCConPlan@mt.gov
Website: https://commerce.mt.gov/Consolidated-Plan
2021-2022 CAPER
Contact Information

DPHHS:
1400 Carter Drive Helena, MT 59601
PO Box 202956 Helena, MT 59620-2956

Administrator:  Gene Hermanson
Bureau Chief:  Sara Loewen
Phone:  406.447.4265
Fax:  406.447.4287
Website:  www.dphhs.mt.gov
Comments regarding the Draft 2021-2022 CAPER are now being accepted.

If you have a comment and are joining via webinar, please raise your hand so we can unmute you. If you are joining via phone, please press *9 to indicate you have a comment and then press *6 to unmute/re-mute yourself.

When providing comment
• Please state and spell your name
• Please state the organization you represent (if applicable)

Written comments should be addressed to the address or email below and will be accepted until 5:00 p.m. on June 29, 2022.

Montana Department of Commerce
Community Development Division
Attn: Con Plan
PO Box 200523
Helena, MT 59620-0523
DOCConPlan@mt.gov