

JEFFERSON COUNTY COMMISSION



JAMES A. "JIMMIE" STEPHENS – PRESIDENT
LASHUNDA SCALES – PRESIDENT PRO TEMPORE
SHEILA TYSON
STEVE AMMONS
T. JOE KNIGHT

November 18, 2022

Reporting Authority
Daren Lanier
Deputy County Manager

COMMISSIONER SHEILA TYSON
Chairman, Community Development & Human
Resources Services Committee

Department of Community Services
Dr. Frederick L. Hamilton, CECD/EDFP, Director
Suite A-430
716 Richard Arrington, Jr. Blvd. North
Birmingham, Alabama 35203-0115
Telephone (205) 325-5761
Fax (205) 325-5095

Subject: 2021 Consolidated Annual Performance Report (CAPER)

FL
RECEIVED DEC 13 2022

Dear Mayor:

The United States Department of Housing and Urban Development requires that in order to receive funding under the Community Development Block Grant Program (CDBG); the Home Investment Partnerships program (HOME); and the Emergency Solutions Grant program (ESG) each Entitlement City or Urban County must prepare a Consolidated Annual Performance Report (CAPER). The overall goal of the community development programs is to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities, principally for low- and moderate-income persons.

The CAPER is designed to provide information on how a grantee actually used its entitlement funds during its most recently completed program year. Jefferson County welcomes citizens' comments on the CAPER. Further information may be obtained by attending a public hearing at the Office of Community Services at 716 Richard Arrington Jr. Blvd., Suite A-420, Birmingham, AL on December 2, 2022 at 10:00 a.m. You may also contact the Office of Community Services at (205) 325-5761. Special accommodations are available, upon request, for those with disabilities and for those with limited English proficiency. Those requiring special accommodations should call (205) 325-5761 in advance for assistance.

Please find enclosed a summary of the Proposed 2021 CAPER for Community Development Programs to be made available for public review through December 19, 2022, at 5PM.

Should you have any questions pertaining to this matter, please feel free to contact ShaDel Nix Williams at (205) 325-5761 or (205) 325-5571.

Sincerely,

Frederick L. Hamilton

Enclosure

Jefferson County Commission
Department of Community Services
A430 716 Richard Arrington, Jr. Blvd North
Birmingham, AL 35203

Mayor Steve Ware
City of Hueytown
P.O. Box 3650
Hueytown, AL 35023



US POSTAGE with meter



ZIP 35203 \$ 002.16⁰
02 4W
0000374811 NOV 17 2009

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.

During the period of October 1, 2021 through September 30, 2022, Jefferson County expended \$2,254,843.58 in Community Development Block Grant (CDBG) funds to provide a suitable, living environment and safe, decent, affordable housing to low- to moderate-income residents of Jefferson County, Alabama. During this period Jefferson County completed six (6) infrastructure/public facility activities; seven (7) public service activities; and fifty-six housing rehabilitation activities for forty household, five (5) demolition cases. Additionally, ten infrastructure/public facility activities, emergency housing rehabilitation activities, and six (6) public service activities in addition to two (2) CDBG-CV public service activities were underway.

The Environmental Review is underway for the HOME funded Villas at York development which will be 52 newly constructed units of elderly rental housing. The Villas at York will have 52 units comprised of one- and two-bedroom units and is located in the unincorporated Grayson Valley area. The Villas at York will utilize \$896,056 in HOME Program funds and leverages Low Income Housing Tax Credits as well as private loan funds. Total costs are anticipated to be approximately \$10,000,000. Construction was completed on the Cherry Woods Apartments which is also a 52 unit elderly rental development in the unincorporated Forestdale area of Jefferson County. All units were leased by Low and Very Low Income elderly residents. Ten of the 52 units are "HOME-assisted" and are occupied by Very Low Income elderly residents. Total HOME funds for the project were \$1,830,078.61. Total development costs were \$10,099,642.61.

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

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

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Acquisition	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	0				
CDBG General Administration	Administration	CDBG: \$	Other	Other	10	12	120.00%	12	10	100.00%
CHDO Administration	Affordable Housing	HOME: \$	Homeowner Housing Added	Household Housing Unit	1	0	0.00%	0	0	0.00%
CHDO Set-Aside	Affordable Housing	HOME: \$	Homeowner Housing Added	Household Housing Unit	4	5	120.00%	1	0	0.00 %
Clearance and Remediation Activities	Non-Housing Community Development	CDBG: \$	Buildings Demolished	Buildings	5	0	0.00%	1	5	0.00%
Construction of Rental Units	Affordable Housing	CDBG: \$ / HOME: \$766550.25	Rental units constructed	Household Housing Unit	40	10	25.00%	5	10	200.00%
Down Payment Assistance	Affordable Housing	HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	1	0	0.00%			
Economic Development Assistance	Non-Housing Community Development	CDBG: \$	Jobs created/retained	Jobs	5	0	0.00%	1	21	0.00%
HESG Admin	Homeless	ESG: \$	Other	Other	2	1	50.00%	2	1	50.00%

HESG HMIS	Homeless	ESG: \$	Other	Other	5	1	20.00%	5	1	20.00%
HESG Homeless Prevention	Homeless	ESG: \$	Homelessness Prevention	Persons Assisted	15	47	313.33%	3	47	1,566.67%
HESG Rapid Re-Housing	Homeless	ESG: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	15	4	26.67%	3	4	133.33%
HESG Shelter	Homeless	ESG: \$	Homeless Person Overnight Shelter	Persons Assisted	500	1795	359.00%	100	1795	1,795.00%
HESG Street Outreach	Homeless	ESG: \$	Other	Other	25	1	4.00%	5	1	20.00%
HOME Administration	Affordable Housing	HOME: \$	Other	Other	4	4	100.00%	4	4	100.00%
Homeownership	Affordable Housing	HOME: \$	Homeowner Housing Added	Household Housing Unit	20	2	10.00%	0	0	0.00%
Housing Program Delivery	Affordable Housing	CDBG: \$	Other	Other	4	0	0.00%	4	4	100.00%
Public Facilities	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1000	22460	3373.5%	200	11,275	5,637.5%

Public Facilities	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	Households Assisted	500	0	0.00%	100	0	0.00%
Public Services	Homeless Non-Homeless Special Needs	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	1661	0.00%	0	1661	0.00%
Public Services	Homeless Non-Homeless Special Needs	CDBG: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	500	2282	0.00%	100	182	182.00%
Rehab of Homeowner Housing: Emergency Repairs	Affordable Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	100	0	0.00%	20	52	260.00%
Rehabilitation of Rental Housing Units	Affordable Housing	HOME: \$	Rental units rehabilitated	Household Housing Unit	5	3	60.00%	0	0	0.00%

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

Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan,

giving special attention to the highest priority activities identified.

Construction of Rental Units (HOME): The Environmental Review is underway for the HOME funded Villas at York development which will be 52 newly constructed units of elderly rental housing. The Villas at York will have 52 units comprised of one- and two-bedroom units and is located in the unincorporated Grayson Valley area. The Villas at York will utilize \$896,056 in HOME Program funds and leverages Low Income Housing Tax Credits as well as private loan funds. Total costs are anticipated to be approximately \$10,000,000. Construction was completed on the Cherry Woods Apartments which is also a 52 unit elderly rental development in the unincorporated Forestdale area of Jefferson County. All units were leased by Low and Very Low Income elderly residents. Ten of the 52 units are "HOME-assisted" and are occupied by Very Low Income elderly residents. Total HOME funds for the project were \$1,830,078.61. Total development costs were \$10,099,642.61

CHDO Administration (HOME): There were no CHDO Administration activities planned for the Program Year.

CHDO Set-Aside (HOME): There were no CHDO Set-Aside activities undertaken in the Program Year.

Down Payment Assistance (HOME): There were no down payment assistance activities planned for the Program Year.

HOME Administration (HOME): During the Program Year four (4) employees conducted administrative functions under the HOME Program.

Home Ownership (HOME): There were no home ownership activities planned for the 2021 Program Year.

Rehabilitation of Rental Housing Units (HOME): There were no plans for the rehabilitation of rental housing units during the 2021 program.

Acquisition (CDBG): No acquisition activities were planned during the Program Year.

CDBG General Administration: During the Program Year ten employees were involved with the administration of CDBG activities.

Clearance and Remediation Activities (CDBG): One (1) clearance and remediation activity, that included five (5) properties in the community of Sylvan Springs, was funded during the Program Year.

Economic Development Assistance (CDBG): Jefferson County closed on multiple loans in the previous project year that created and retained

twenty-one during the 2021 Program Year.

Housing Program Delivery (CDBG): Four (4) employees provided housing program delivery services related to CDBG housing activities during the Program Year.

Public Facilities (CDBG): During the Program Year six (6) public facility activities have been completed and another 10 are in design or under construction.

Public Service: During the Program Year seven (7) public service activities have been completed and another six (6) are ongoing. Additionally, there were two (2) CDBG-CV public service activities ongoing with one (1) housing related and one (1) non-housing related.

CR-10 - Racial and Ethnic composition of families assisted

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

91.520(a)

	CDBG	HOME	ESG
White	6,649	1	799
Black or African American	6,152	9	1,544
Asian	208	0	8
American Indian or American Native	36	0	7
Native Hawaiian or Other Pacific Islander	12	0	3
Total	13,632	10	2,464
Hispanic	575	0	83
Not Hispanic	13,057	10	2,359

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

Narrative

HOME: A total of 10 elderly tenants at Cherry Woods were “HOME-assisted” through the development of new rental housing. HOME funding, in combination with a private loan and Low Income Housing Tax Credits (LIHTC) for the Cherry Woods project, made it possible for the construction of a total of 52 new rental housing units for the elderly by providing the needed gap financing.

CR-10 does not include Multiple Races, Client Doesn’t Know/Refused, and other HMIS approved racial categories. CR-10 does not include Client Doesn’t Know/Refused and other HMIS approved ethnic categories. The difference in the total is a result of this discrepancy.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Table 3 - Resources Made Available

Narrative

During the period of October 1, 2021 through September 30, 2022, Jefferson County received \$2,510,681.00 in CDBG funds; \$22,198.88 in CDBG program income; \$992,574.00 in HOME funds; \$186,856.36 in HOME program income; \$0.00 in HOME matching funds; \$0.00 in County Match; \$205,915.00 in Federal ESG; and \$114,679.71 in ESG match making a total of \$4,032,904.95 in funds available for Program Year 2021.

Additionally, Jefferson County expended \$360,046.28 in CDBG-CV and \$866,835.56 in ESG-CV funding.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description

Table 4 – Identify the geographic distribution and location of investments

Narrative

During the period of October 1, 2021 through September 30, 2022 CDBG funds were drawn for activities within the following geographical locations: County-wide including unincorporated areas of Jefferson County for Housing Rehabilitation and Public Service activities, Public Facilities in the municipalities of Irondale, Center Point, Brighton, Lipscomb, Mulga, Graysville, Pinson, Midfield, and Fairfield, plus public facilities in unincorporated areas of Jefferson County.

Completed HOME funded rental units are located in the unincorporated Forestdale area of Jefferson County. Another elderly rental development in the unincorporated Grayson Valley area of Jefferson County has been awarded County HOME funds as well as LIHTC from the Alabama Housing Finance Authority. The Environmental Review was underway during the reporting period with construction beginning during the following Program Year.

Leveraging

Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.

The HOME Program did not leverage any \$8,321,642.00 in private loans and Low Income Housing Tax Credits during the reporting period of October 1, 2021 – September 30, 2022. Construction on the Cherry Woods Apartments was completed during the reporting period.

Jefferson County had excess match available for the reporting period. No publicly owned land was used to address the needs identified in the plan for the HOME Program.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	2,071,751
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	2,071,751
4. Match liability for current Federal fiscal year	0
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	2,071,751

Table 5 – Fiscal Year Summary - HOME Match Report