

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 City of Wauwatosa received a total of \$997,039 in Community Development Block Grant (CDBG) funding in 2023 and approved allocations to 11 different organizations totaling the full award.

Each project was designed to meet one of three major objectives (decent housing, suitable living environment or economic opportunity) and successfully contributed accomplishments under one of the City's identified goals: provide services to seniors, improve the quality of life for individuals with disabilities, undertake improvements to public facilities, promote economic development, promote equal opportunity in housing, increase/improve affordable housing opportunities for LMI households.

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
Develop economy and employment	Non-Housing Community Development	CDBG: \$	Jobs created/retained	Jobs	29	4	13.79%	30	4	13.33%
Develop economy and employment	Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	150	27	18.00%	5	24	480.00%

Improve/develop infrastructure	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	315	883	280.32%	650	0	0.00%
Improve/develop infrastructure	Non-Housing Community Development	CDBG: \$	Rental units constructed	Household Housing Unit	0	0		50	0	0.00%
Increase the supply of standard affordable housing	Affordable Housing	CDBG: \$	Rental units rehabilitated	Household Housing Unit	50	0	0.00%			
Increase the supply of standard affordable housing	Affordable Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	125	8	6.40%	10	6	60.00%
Increase the supply of standard affordable housing	Affordable Housing	CDBG: \$	Businesses assisted	Businesses Assisted	0	0				
Provide Services to targeted populations	Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	5000	4478	89.56%	1000	592	59.20%
Provide strong program planning and administration	Administration	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	0				

Provide strong program planning and administration	Administration	CDBG: \$	Other	Other	1	0	0.00%	1	0	0.00%
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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.

Specific objectives identified in the City's plan are: provide services to seniors, improve the quality of life for individuals with disabilities, undertake improvements to public facilities, promote economic development, promote equal opportunity in housing, and increase/improve affordable housing opportunities for LMI households. In 2023, priority programs that fall into the public service and public facilities/economic development categories, such as the programs that assist Wauwatosa’s senior and disabled populations, renovations to health care facilities, housing rehab, and increased affordable housing opportunities received the bulk of funding and consistently do or will meet their goals.

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
White	1,504
Black or African American	636
Asian	66
American Indian or American Native	19
Native Hawaiian or Other Pacific Islander	13
Total	2,238
Hispanic	60
Not Hispanic	502

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

Narrative

The data above represents most individuals served through the City's Public Service organizations as reflected on the PR23 report 'CDBG Beneficiaries by racial/ethnic category. The 'Other – Multi Racial' category reported on the PR23 totaled 1,324. Numbers that are not included are those of people residing in the health care facilities that received funding for renovation and economic development programs that created jobs or assisted businesses, but the comparative breakdown is similar to the numbers above.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	1,003,274	1,278,471

Table 3 - Resources Made Available

Narrative

The City received access to PY 2023 CDBG funds in July 2023. Subrecipient allocations are described below.

\$100,000 Administration/Planning

\$50,000 Comprehensive Plan

\$41,790 Milwaukee Metropolitan Fair Housing Council

\$82,911 Senior Center

\$6,911 Tosa Cares

\$25,911 Life Navigators

\$6,911 Vision Forward

\$26,911 ERAS Senior Network

\$35,000 WWBIC

\$144,491 Lutheran Home

\$152,130 Luther Manor

\$137,500 Carmelite

\$186,573 Community Development Authority

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Wauwatosa CDBG Entitlement Jurisdiction	100	100	Entitlement City Jurisdiction

Table 4 – Identify the geographic distribution and location of investments

Narrative

The City of Wauwatosa allocated CDBG funds to organizations and projects that serve Wauwatosa residents.

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 City of Wauwatosa allocated CDBG funds to organizations and projects that serve Wauwatosa residents. The City typically does not obtain other public and private resources to provide additional resources beyond CDBG funds for these specific programs. When possible and applicable, the City can leverage other grant funds to assist in addressing needs. For example, brownfield grants can be leveraged to assist redevelopment efforts and support economic development.

The organizations supported with City CDBG funds obtain other resources to operate their programs and are able to leverage additional resources from the private and nonprofit sectors in order to fully implement their projects. CDBG funds allow the organizations to provide a higher level of service to meet the demand; without the funds service would be cut or reduced.

The City of Wauwatosa only receives funds from the CDBG Program and this program does not have any matching requirements.

The only facility that operates on publicly owned land is the Wauwatosa Senior Center, located in the Muellner Building in Hart Park (owned by the City) and at the Civic Center; the senior center program is operated by the Wauwatosa School District Recreation Department.

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.

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	0	0
Number of Non-Homeless households to be provided affordable housing units	0	0
Number of Special-Needs households to be provided affordable housing units	0	0
Total	0	0

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	0
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	5	6
Number of households supported through Acquisition of Existing Units	0	0
Total	5	6

Table 6 – Number of Households Supported

Discuss the difference between goals and outcomes and problems encountered in meeting these goals.

Wauwatosa uses subrecipient Community First for rehab of existing units. Community First continues to work on projects in 2023. The City does not expend funds for rent assistance. These actions are undertaken by Milwaukee County with the use of HOME funds allocated to the consortium that the City participates in. The Milwaukee Continuum of Care covers the City of Milwaukee, City of West Allis, City of Wauwatosa and the remainder of Milwaukee County. The Milwaukee Continuum of Care is recognized by local government, the State of Wisconsin, and the federal government as the group

responsible for planning, organizing, and evaluating the continuum of services for homeless individuals and families.

Discuss how these outcomes will impact future annual action plans.

Community First is in the process of completing 2022 projects in 2024. Starting in 2024, the City proposes to administer a Housing Rehabilitation program using CDBG funds.

The City recently completed its 2023 Comprehensive Housing Study highlighting the need for a range of housing options to meet various needs, including low income individuals, workforce housing, housing for seniors and housing for the disabled. Subsequently housing policies, programs and strategies to implement the recommendations will give further direction to housing redevelopment decisions and the use of CDBG funds to meet affordable housing goals.

Recommendations from the a previous Housing Study have resulted in developments that increase the construction of affordable housing units and staff expects this trend to continue in the coming years. Currently, Wauwatosa’s Economic Development Investment Policy states that new housing developments receiving financial assistance from the City contain approximately 20% affordable units. The City’s zoning does allow for smaller lot sizes and a variety of multi-family properties that in turn offer more affordable housing options than would exist otherwise. The City has recently added accessory dwelling units (ADU) to the zoning code to allow another housing option.

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.

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	2	0
Low-income	3	0
Moderate-income	1	0
Total	6	0

Table 7 – Number of Households Served

Narrative Information

Wauwatosa's objective is to provide affordable housing with a particular emphasis on low-income individuals. The objective was met by providing 4 households with affordable housing rehab work.

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

It is difficult to assess the number of homeless individuals in the City of Wauwatosa and other than the occasional police report, or individuals encountered around City Hall, knowledge of the exact number of homeless is largely unknown. There are no shelters in Wauwatosa so homeless individuals are referred to organizations in the surrounding area that provide emergency shelter and other services. The City participates in the Point in Time Count undertaken by the Continuum of Care. The most recent reported count numbers for unsheltered individuals remain low relative to previous 10 years of reporting. This decrease is attributed to expanded outreach, CARES Act funding for additional housing and increased prevention effort to reduce evictions, emergency placements and temporary shelters.

The City of Wauwatosa aimed funds at preventing homelessness in the community through the funding of programs that assist LMI households by providing affordable housing services and basic needs services to aid in homelessness prevention. In addition, Tosa Cares assisted those individuals in need with emergency food supplies, toiletries, and clothing

Addressing the emergency shelter and transitional housing needs of homeless persons

In PY 2023, CDBG funds did not assist any organizations that work solely with homeless populations. The City participates in the Continuum of Care and collaborates with existing housing developments to assess the number of units in need of rehabilitation or facilities that could expand their number of units in an effort to maintain, and when possible increase, the number of affordable housing units offered/available. The City continued to support the programs and services within the community that provide much needed emergency assistance to LMI households that in turn helped prevent homelessness.

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

The City provides referrals to subsidized and affordable housing developments in the community. In addition, the City continued to support the programs and services within the community that provide

much needed assistance to LMI households, in turn helping prevent homelessness. Participation in Milwaukee's Continuum of Care supports resources in the community working to end homelessness.

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

The City of Wauwatosa is a member of the Milwaukee County Continuum of Care, a coalition whose mission is to organize people and resources to end homelessness in Milwaukee. The CoC has developed a 10 year plan to end homelessness and meets to work on issues and opportunities people experiencing homelessness. The CoC conducts Point in Time Counts and Wauwatosa participated in these events. While the City's Health Department does not admit people for care, it does give people referrals to agencies in the surrounding area that provide shelter and services for the homeless. As there are no permanent, transitional, or public housing facilities in the City, partnering with the CoC is the best avenue for assisting these populations.

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

Actions taken to address the needs of public housing

There is no public housing located in the City of Wauwatosa.

Actions taken to encourage public housing residents to become more involved in management and participate in homeownership

There is no public housing located in the City of Wauwatosa.

Actions taken to provide assistance to troubled PHAs

There is no public housing located in the City of Wauwatosa.

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)

In a typical year only a handful of new detached residential units are constructed in Wauwatosa, though in recent years there have been hundreds of apartment units built. Cost of these developments is market driven and as a result of the high land values in the City, developers have not not always constructed truly affordable housing units. Recent developments that received CDBG funds and WHEDA tax credits do include affordable units.

The City completed a comprehensive Housing Study in 2023 that highlights the need for a range of housing options to meet various needs, including low income individuals, workforce housing, housing for seniors and housing for the disabled. An update to that Housing Study is underway and housing policies, programs and strategies to implement the recommendations of the study will give further direction to housing redevelopment decisions. More recently, the opportunity to include affordable housing units into new developments has arisen through finance options that developers need to move projects forward. When a housing project receives financial assistance from the City, it must meet a need identified in the City's Housing Study and include an affordability component. Staff has supported these proposals during the approval process and expects to see a continued increase in the construction of affordable housing units in the coming years.

The City's zoning does allow for smaller lot sizes and a variety of multifamily properties that in turn offer more affordable housing options than would exist otherwise. The City has added accessory dwelling units (ADU) to the zoning code to allow another housing option. Also, the 'Zone Tosa For All' initiative is underway and recommendations to allow for inclusive housing will go forward for Common Council adoption.

Actions taken to address obstacles to meeting underserved needs. 91.220(k); 91.320(j)

Underserved Housing Needs: The City supported MMFHC fair housing services.

Underserved Senior Citizens: Funding of the Senior Center and ERAS Senior Network ensured activities/services to improve/maintain the quality of life and personal well-being of Wauwatosa's senior population. Examples of services that were provided by these organizations include social activities, recreational opportunities and services such as transportation and minor home repair are available to the City's senior population.

Underserved People With Disabilities: Funding for Life Navigators allowed continued operation of family support and crisis intervention services for disable people to improve health, safety and work/live experiences. Facility rehab activities provided accessibility modifications for people with disabilities.

Actions taken to reduce lead-based paint hazards. 91.220(k); 91.320(j)

Wauwatosa actions to reduce lead-based paint hazards include utilizing lead-certified contractors and lead safe practices in housing rehabilitation projects. In partnership with the Wisconsin Childhood Lead Poisoning Prevention program (WCLPPP), Wauwatosa public health nurses work with all families of lead poisoned children to provide education and monitoring. Certified staff conduct environmental assessments on homes in which lead-poisoned children reside. The nurses work with the families to monitor the child's health and prevent future lead poisonings. The Wauwatosa Health Department also has free publications and literature about remodeling and the hazards of lead.

Actions taken to reduce the number of poverty-level families. 91.220(k); 91.320(j)

Housing: The City continues to uphold and enforce zoning ordinances that maintain small size residential lots and allow for high-density, multi-family developments that can more easily accommodate LMI households. Funding for rental and homeowner rehab helps maintain affordable housing and allows seniors to age in place. In addition, the construction of new affordable units expands the available supply, providing greater opportunity for LMI household to reside in Wauwatosa.

Economic Development: Through the Economic Development grants/loans to businesses, jobs are created for LMI individuals through grants and loans to businesses located in the community, thereby working to alleviate poverty for these people.

Emergency Services: Tosa Cares provided emergency relief services to families and individuals below the poverty level. The provisions of food, school supplies and clothes lift some of the cost burden of these necessities and help to alleviate poverty.

Actions taken to develop institutional structure. 91.220(k); 91.320(j)

In order to develop more effective institutional relationships, staff attends CDBG trainings and conferences and works in coordination with the various institutions with which it works – City government, HUD, subrecipients and community groups and citizens.

Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)

The individual organizations and programs that the City funded with CDBG money were able to leverage additional resources from the private and non-profit sectors in order to fully implement their projects. Each organization that the City supports with CDBG funding also received other public and private funding and/or donations that assist them in carrying out their programs. CDBG funds allow the organizations to provide a higher level of service to meet the demand; without the funds service would be cut or reduced.

Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)

Fifteen impediments (#12 & #13 for City of Milwaukee only) were identified in the ***Regional Analysis of Impediments to Fair Housing 2020 report***. Although the report is regional in nature, the City of Wauwatosa has focused the most on the impediments listed below. A table summarizing current efforts to address identified impediments is attached - Wauwatosa Addressing Impediments to Fair Housing.

"Impediment:" Lack of Awareness of Fair Housing Laws

"Action;" The City's CDBG program has focused on preventing fair housing discrimination, promoting fair housing education and providing information and referral services. Wauwatosa partners with the Metropolitan Milwaukee Fair Housing Council (MMFHC) who operates four programs that conduct a variety of activities to promote equal opportunity in housing (enforcement program, outreach & education program, community & economic development program and training & technical assistance program).

"Impediment:" Restrictive Local Land Use Regulations and Other Ordinances

"Action:" The City of Wauwatosa completed an update of the current zoning code to address inequities in the Ordinance. This effort began in 2021 and included focus groups and outreach with various members of the community. The focus was on equal access to housing, accessibility for people with disabilities and creating an equitable structure to review zoning and land use decisions. "Tosa Zone for All", recommendations from this effort are currently being brought forward for consideration and adoption.

The City also adopted an Accessory Dwelling Unit (ADU) ordinance which allows ADUs in single-family districts.

"Impediment:" Lack of Regionally Dispersed Affordable Housing

"Action:" The expanded use of CDBG and HOME (through the Consortium with Milwaukee County) provides additional funds for housing developments.

CR-40 - Monitoring 91.220 and 91.230

Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

Contact with subrecipients helped determine adherence to regulations and ensure the identified objectives and outcomes were being followed. To further meet these ends, the collection of local agreements and data reports demonstrated that the programs were addressing/meeting the goals and objectives that were identified in the Plan. When there were discrepancies, staff works with the organization until the problem is resolved. Internal controls monitored the evaluation of money requests, drawdown procedures and actions related to CDBG eligibility requirements. Checklists for each subrecipient were maintained to track the necessary documentation and progress status.

Staff maintains an ongoing expense ledger, separate from IDIS, which tracks each subrecipient's funding amount and drawdowns for past and present years. Staff monitored timeliness via this ledger throughout the year and if necessary, contacted organizations notifying them of the need to spend funds. This documentation, along with reports such as the PR03 that were downloaded from IDIS, and regular contact with HUD staff regarding timeliness are all actions undertaken to monitor and ensure timeliness was met.

Essentially all Wauwatosa CDBG activities are conducted by subrecipients. Regular phone and e-mail contact throughout the year helped City staff monitor subrecipient activities. Staff conducts in-house monitorings of subrecipients, the nature of the which consisted primarily of file and record reviews, including a comparison of application project proposal and actual project activity, an analysis of the format and quality of reporting and accomplishment information, and a review of invoice records. In addition, the City is audited annually by an outside firm and an audit of the CDBG program is part of that process. The City worked with a consultant to provide direct subrecipient monitoring assistance in 2023.

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

Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.

Notice for public meetings regarding CDBG activities, plans, and applications are published in the local newspaper, advertised on notice boards at City Hall and on the City website along with contact information should citizens have any questions. The public hearing for PY 2023 was held December 14,

2022. The minutes have been attached to this document. The public comment period for the CAPER was March 27 through April 12, 2024. The draft document was available on the City website and a hard copy was available for viewing at City Hall. No public comments were received. The public notice has been attached to this document. An affidavit of publication was received.

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.

Wauwatosa's CDBG program does not vary much from year to year in terms of activities that are funded, and the programs undertaking these activities address high priority needs within the community. Subrecipients determined the indicator they would use to measure results throughout the year by the category best suited their activities (i.e. people, households, facilities etc). The indicator was chosen when the subrecipient applied for CDBG funds. As far as improving the success of meeting housing goals, a strategy that includes greater outreach and advertising of the funded programs could increase participation, along with greater solicitation/outreach to other organizations that provide housing services in the community. The City will be focusing more on rehabbing existing units and construction new affordable units. Each year, the CDBG Committee evaluates previous and new applications based on past performance and the need for additional or new services. The Common Council also votes on funding allocations and can shift the focus of fund usage based on needs the community has expressed.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.

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.

Wauwatosa’s CDBG program does not vary much from year to year in terms of activities that are funded, and the programs undertaking these activities address high priority needs within the community. Subrecipients determined the indicator they would use to measure results throughout the year by the category best suited their activities (i.e. people, households, facilities etc). The indicator was chosen when the subrecipient applied for CDBG funds. As far as improving the success of meeting housing goals, a strategy that includes greater outreach and advertising of the funded programs could increase participation, along with greater solicitation/outreach to other organizations that provide housing services in the community. The City will be focusing more on rehabbing existing units and construction new affordable units. Each year, the CDBG Committee evaluates previous and new applications based on past performance and the need for additional or new services. The Common Council also votes on funding allocations and can shift the focus of fund usage based on needs the community has expressed.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.

CR-58 – Section 3

Identify the number of individuals assisted and the types of assistance provided

Total Labor Hours	CDBG	HOME	ESG	HOPWA	HTF
Total Number of Activities	0	0	0	0	0
Total Labor Hours	0				
Total Section 3 Worker Hours	0				
Total Targeted Section 3 Worker Hours	0				

Table 8 – Total Labor Hours

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers					
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.					
Technical assistance to help Section 3 business concerns understand and bid on contracts.					
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.					
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.					
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					

Other.					
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Table 9 – Qualitative Efforts - Number of Activities by Program

Narrative

The expenditure of CDBG funds in 2023 did not result in any contracts covered by Section 3 or new hires during the 12 month period.

Attachment

Addressing Fair Housing

Addressing Fair Housing Impediments		
Analysis of Impediments	Actions Implemented or Underway	Actions to Consider / Implement
Impediment #1: Lack of Regional Housing Strategy or Plan	<ul style="list-style-type: none"> Part of a consortium with Milwaukee County (and West Allis) to use HOME funds and partnered on Horizon's Cedar Glen and Walnut Glen projects Tosa undertook housing study (2016) and initial housing policies to begin addressing housing disparities Council accepted an updated Housing Study & Needs Assessment in March, 2023. 	<ul style="list-style-type: none"> Work with the collaborative to ensure all communities expand housing options, establish a mobility program, endorse a state legislative change to include a fair housing plan as part of the housing element required by WI's Smart Growth and Comp Planning law Regularly update City housing study and housing policies
Impediment #2: Lack of Regionally Dispersed Affordable Housing	<ul style="list-style-type: none"> Partnered to use HOME, CDBG, LIHTC for Cedar Glen, Walnut Glen and MSP's River Parkway and Mayfair Collection affordable projects CDA* negotiating Harlow & Hem project, 20% affordable units at Blanchard parking lot site and Cornerstone project, 20% affordable & ID/D units Prioritized unmet housing needs in City's EDIP** as criteria for City financing in housing projects (affordable workforce, special needs, etc.) Enacted TIF Affordable Housing Extension per State Statute CDA established Affordable Housing Fund 	<ul style="list-style-type: none"> Identify ways to support naturally occurring, privately owned affordable rental housing that is not publicly subsidized Continue to identify avenues partnerships for funding affordable housing development Update and revise EDIP as necessary Lobby State to allow for inclusionary zoning opportunities
Impediment #3: Restrictive Local Land Use Regulations and Other Ordinances	<ul style="list-style-type: none"> Adopted Accessory Dwelling Unit (ADU) Ordinance Smaller lot sizes permitted in zoning No minimum building square footage in residential districts Completed "Zone Tosa for All" project to provide recommendations for making equitable zoning/land use decisions (2021). 	<ul style="list-style-type: none"> Undertaking review and update of zoning code to address inequities and revise requirements (i.e. density) Lobby State to allow for inclusionary zoning opportunities
Impediment #4: Restrictive Zoning Regulations for Group Homes and Community Living Facilities	<ul style="list-style-type: none"> City follows State requirements 	<ul style="list-style-type: none"> Consider modifications to Conditional Use zoning requirements
Impediment #5: Prevalent "Fear of Others" Exists among Residents, including NIMBYism	<ul style="list-style-type: none"> City's CDBG funds Milwaukee Metropolitan Fair Housing Council (MMFHC) annually to provide training, outreach, support etc. 	<ul style="list-style-type: none"> Promote density as good for social and economic diversity Community Activism

March 3, 2023

City of Wauwatosa – Development Department

Analysis of Impediments	Actions Implemented or Underway	Actions to Consider / Implement
Impediment #6: Strong Jobs-Housing-Transit Mismatch	<ul style="list-style-type: none"> Recent housing developments near transit/jobs (Mayfair Road, Village, Mayfair Collection) By a majority, the Common Council supported BRT project 	<ul style="list-style-type: none"> Continue to identify redevelopment opportunities in close proximity to jobs and transit Partner with large employers to develop transit options and housing opportunities
Impediment #7: Lack of Fair Housing Guidance and Enforcement	<ul style="list-style-type: none"> Fair housing ordinance in 1968 addressing sale, rental, or lease of housing. Protected classes are those that are included in the Wisconsin Open Housing Law. (MMFHC) provides landlord trainings twice a year in Tosa as well as additional trainings in the metro area 	<ul style="list-style-type: none"> Increase awareness of fair housing laws and resources; promote on social media Regularly review fair housing laws and ordinances (partner with MMFHC) to ensure they remain current
Impediment #8: Lack of Accessible Housing for Persons with Disabilities	<ul style="list-style-type: none"> Prioritized accessible housing as an unmet housing need in City's EDIP as criteria for City financing in housing projects Funded home accessibility modifications through CDBG in partnership with Community First. In 2023 Housing Rehabilitation Program is City operated with ARPA/CDBG. CDA established Affordable Housing Fund 	<ul style="list-style-type: none"> Establish relationships and work with accessible housing developers to identify sites and opportunities for accessible housing developments Consider new funding sources for the CDA's Affordable Housing Fund/Housing Trust Fund (similar to City of Milwaukee)
Impediment #9: Gap in Homeownership by Racial and Ethnic Minorities Compared to White Households	<ul style="list-style-type: none"> CDBG funded first-time down payment assistance program in partnership with Housing Resources, Inc. 	<ul style="list-style-type: none"> Consider establishing a Special Needs Housing Trust Fund (similar to Milwaukee County) as a new source of revenue to develop supportive housing Identify programs and funding sources to address homeownership disparities
Impediment #10: Overcrowded Housing	<ul style="list-style-type: none"> Low overcrowded rental units in Wauwatosa compared to other cities in the collaborative 1.9% in 2017 	<ul style="list-style-type: none"> Consider incentivizing larger rental units in City's EDIP (3,4-bedroom)
Impediment #11: Extensive Use of Evictions	<ul style="list-style-type: none"> Low eviction rate of Wauwatosa. 0.48 per 100 renters in 2016 as referenced in the analysis 	<ul style="list-style-type: none"> Determine a system and monitor rates to keep measure of evictions
***Impediment #14: Racial and Ethnic Disparities in Mortgage Lending, Insurance, and Appraisal Practices	<ul style="list-style-type: none"> City's CDBG funds MMFHC annually to provide training, outreach, support etc. 	<ul style="list-style-type: none"> Advocate for new process and approaches in lending and appraisal practices Promote educational and financial trainings
Analysis of Impediments	Actions Implemented or Underway	Actions to Consider / Implement

March 3, 2023

City of Wauwatosa – Development Department

Impediment #15: Lack of Awareness of Fair Housing Laws	<ul style="list-style-type: none"> City's CDBG funds MMFHC annually to provide training, outreach, support etc. 	<ul style="list-style-type: none"> Increase awareness of fair housing laws and resources; promote on social media
<p>* CDA – Community Development Authority ** EDIP – Economic Development Investment Policy ***Impediments #12 & #13 apply to City of Milwaukee only</p>		

March 3, 2023

City of Wauwatosa – Development Department

Public Hearing 1

City of Wauwatosa Community Development Block Grant Committee

Meeting Minutes
December 7, 2022
6:00 PM
Committee Room #1

Present: Ald. Sean Lowe, David Frazer, Bill Kopka, Linda Ertel, Kate Venne, Lita Mallet
(chair)

Excused: Mary Beth Budisch

Also Present: Karl Schreiber, Jennifer Ferguson

Introduction

The meeting was called to order at 6:00 PM. Six (6) committee members were present.

Item 1. Public Hearing and Public Comment on 2023 CDBG Community Needs and Citizen Participation Plan.

The public hearing regarding CDBG community needs and the citizen participation plan was opened for public comment. Mr. Schreiber described the 2023 Public Participation Plan. Ms. Ferguson gave an overview of the CDBG program. No members from the public were present and no comments were received from the public. Ms. Venne and Mr. Frazer encouraged expansion of public notice.

Mr. Kopka motioned to approve the 2023 Citizen Participation Plan and Mr. Lowe seconded. The motion carried unanimously (6 Yes, 0 No)

Item 2. Program Updates and Projects

Mr. Schreiber updated Committee members regarding the 2022 program year. A brief overview of the 2020-2024 Consolidated Plan was provided. The Committee requested Staff forward a history of total CDBG grants by program year.

The meeting adjourned at 6:45 PM.

Public Hearing 2

City of Wauwatosa Community Development Block Grant Committee

Meeting Minutes
December 14, 2022
6:00 PM
Committee Room #1

Present: Lita Mallett (chair), Ald. Sean Lowe, Marybeth Budisch, David Frazer, Kate Venne

Excused: William Kopka, Linda Ertel

Also Present: Karl Schreiber, Jennifer Ferguson

Item 1. Introductions

Committee member and staff introductions were made.

Item 2. Public Hearing.

Two comments from CDBG members at a previous meeting were read into the public hearing.

- Continue to fund economic development programs that benefit LMI individuals.
- Work to expand public notification of the CDBG program and associated meetings.

The following individuals attended the meeting and spoke on behalf of the organizations requesting 2021 CDBG funding:

- *Megan Wanke – Metropolitan Milwaukee Fair Housing Council (MMFHC)*
MMFHC continues to provide fair housing information, counseling, investigative services, enforcement and training. Two free to the public fair housing seminars are conducted for Tosa each year. The fair housing component is a HUD requirement for each grant year.
- *Kosta Zervas – Senior Center*
The Wauwatosa Senior Center operates out of two locations. Grant funds pay for center maintenance and staffing resources. The Senior Center provides classes, luncheons, activity planning, and social interaction programming.
- *Christina Knudsen – WWBIC*
Wisconsin Women's Business Initiative Corporation (WWBIC) provides no cost training, technical assistance, and on-going support for small businesses, and prospective entrepreneurs in Tosa. CDBG funds would cover operation costs such as salaries.
- *JoAnn Walsh – Tosa Cares*
Tosa Cares is a volunteer run organization that has been helping for 14 years and demand for assistance continues to grow. Tosa Cares provides gap services such food, clothing, personal hygiene supplies to families and individuals.

- *Patrick Hansen – Luther Manor*
Luther Manor proposes a nursing home project, Project Sunshine, which is a courtyard garden.
- *Mark Rose – Lutheran Home*
CDBG funding will be used for window replacement throughout the facility in resident rooms and public spaces. This is phase 2 of a three-year project. The Lutheran Home provided more than \$12 million in charity care. CDBG funding assistance allows the Lutheran Home to provide care for more clients. 80% of clients are Title 19 recipients.
- *Jeffrey Robb – Carmelite Ministry of St. Theresa*
Carmelites serve women and individuals with intellectual disabilities. 100% of clients are LMI. CDBG funds will be used for HVAC repairs, water/sewer repairs, and renovations to 1214 Kavanaugh building. Mr. Lowe inquired about Carmelite budget as a non-profit.
- *Sister Rose – Carmelite Ministry of St. Theresa*
A description of hosted community events was presented.
- *Sophia Franklin – Eras Senior Network*
CDBG funding is needed to help cover the salary of staff that operates the neighborhood outreach program, along with minor operational costs for the services provided by Eras. Services help seniors to age-in-place, and be safer in their home. Services for seniors include things like delivering groceries, home maintenance, transportation and social visits. There is no cost to the seniors who utilize the services. 23 new clients were added in 2022.
- *Vicki Wachniak– Life Navigators*
Life Navigators submitted a letter to the Committee describing services provided.

With no more persons wishing to speak the public hearing was closed at 6:45 PM.

Item 3. Approval of funding recommendations for 2023 CDBG program year.

Motion to approve recommended funding levels in the Admin and Planning category by Marybeth Budisch and seconded by Mr. Lowe. Motion carried unanimously (5 Yes, 0 No)

Motion to approve recommended funding levels in the Public Services category by Kate Venne and seconded by Mr. Frazer. Motion carried unanimously (5 Yes, 0 No)

Motion to approve recommended funding levels in the Public Facilities category except to focus any additional funding towards the CDA grant application by Marybeth Budisch and seconded by Mr. Frazer. Motion carried unanimously (5 Yes, 0 No)

Item 4. Meeting adjourned 6:50 PM.

Notice



Order Confirmation
Not an Invoice

Account Number:	960144
Customer Name:	City Of Wauwatosa
Customer Address:	City Of Wauwatosa 7725 W North AVE Attn: Accounts Payable Wauwatosa WI 53213-1720
Contact Name:	
Contact Phone:	
Contact Email:	
PO Number:	CAPER Public Notice

Date:	03/18/2024
Order Number:	9972334
Prepayment Amount:	\$ 0.00

Column Count:	1.0000
Line Count:	20.0000
Height in Inches:	0.0000

Print			
Product	#insertions	Start - End	Category
MJS North Comm NOW	1	03/27/2024 - 03/27/2024	Govt Public Notices
MJS isonline.com	1	03/27/2024 - 03/27/2024	Govt Public Notices

As an incentive for customers, we provide a discount off the total order cost equal to the 3.99% service fee if you pay with Cash/Check/ACH. Pay by Cash/Check/ACH and save!

Total Cash Order Confirmation Amount Due	\$26.40
Tax Amount	\$0.00
Service Fee 3.99%	\$1.05
Cash/Check/ACH Discount	-\$1.05
Payment Amount by Cash/Check/ACH	\$26.40
Payment Amount by Credit Card	\$27.45

Order Confirmation Amount	\$26.40
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Ad Preview

OFFICIAL NOTICE

The City of Wauwatosa has prepared a Consolidated Annual Performance and Evaluation report involving the use of 2023 Community Development Block Grant funds. This report will be available for public comment from March 27, 2024 through April 12, 2024 in the Development Department at Wauwatosa City Hall 7725 W. North Avenue or on the City's website at <https://www.wauwatosa.net/government/departments/development/economic-development/business-finance-opportunities/community-development-block-grant-cdbg-program>.

For questions or comment please contact the Department at 414-471-8400; kschreiber@wauwatosa.net.

RUN: March 27, 2024

WNAXLP

2/2

PR26 reports

	Office of Community Planning and Development	DATE: 03-25-24
	U.S. Department of Housing and Urban Development	TIME: 10:48
	Integrated Disbursement and Information System	PAGE: 1
	PR26 - CDBG Financial Summary Report	
	Program Year 2023 WAUWATOSA, WI	

PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	0.00
02 ENTITLEMENT GRANT	997,039.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	17,379.52
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	24,692.91
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)	1,039,111.43

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	1,088,479.57
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	1,088,479.57
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	189,991.59
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	1,278,471.16
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	(239,359.73)

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	1,088,479.57
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	1,088,479.57
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

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	130,313.63
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	24,692.91
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	155,006.54
32 ENTITLEMENT GRANT	997,039.00
33 PRIOR YEAR PROGRAM INCOME	46,887.34
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	1,043,926.34
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	14.85%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	189,991.59
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	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	189,991.59
42 ENTITLEMENT GRANT	997,039.00
43 CURRENT YEAR PROGRAM INCOME	17,379.52
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	1,014,418.52
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	18.73%



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
2023	7	1647	6807346	MSP Mayfair Collection CDA	01	LWC	\$300,000.00
					01	Matrix Code	\$300,000.00
2021	6	1614	6743986	Carmelite Ministry	03B	LWC	\$4,235.00
2021	6	1614	6810008	Carmelite Ministry	03B	LWC	\$4,425.00
2023	6	1646	6842099	Carmelite	03B	LWC	\$14,875.00
2023	6	1646	6845967	Carmelite	03B	LWC	\$39,636.00
					03B	Matrix Code	\$63,171.00
2022	6	1633	6733978	Lutheran Home	03P	LWC	\$25,185.60
2022	6	1633	6786417	Lutheran Home	03P	LWC	\$56,152.70
2022	6	1633	6796912	Lutheran Home	03P	LWC	\$96,162.70
2022	6	1633	6845967	Lutheran Home	03P	LWC	\$5,099.00
2023	6	1644	6845967	Lutheran Home	03P	LWC	\$24,045.00
					03P	Matrix Code	\$166,645.00
2022	3	1625	6824001	Senior Center	05A	LWC	\$82,000.00
2022	3	1626	6718938	ERAS Senior Network	05A	LWC	\$1,271.54
2022	3	1626	6773140	ERAS Senior Network	05A	LWC	(\$24,692.91)
2023	3	1642	6816891	ERAS Senior Network	05A	LWC	\$23,538.98
2023	3	1642	6837458	ERAS Senior Network	05A	LWC	\$3,372.02
					05A	Matrix Code	\$85,489.63
2022	4	1628	6718938	Vision Forward	05B	LWC	\$6,002.00
2023	4	1640	6810008	Life Navigators	05B	LWC	\$25,911.00
					05B	Matrix Code	\$31,913.00
2022	5	1629	6718938	Tosa Cares	05W	LWC	\$6,000.00
2023	5	1639	6848994	Tosa Cares	05W	LWC	\$6,911.00
					05W	Matrix Code	\$12,911.00
2022	7	1632	6720450	Community First	14A	LWH	\$10,480.00
2022	7	1632	6723346	Community First	14A	LWH	\$44,988.00
2022	7	1632	6728563	Community First	14A	LWH	\$24,053.14
2022	7	1632	6733978	Community First	14A	LWH	\$24,000.00
2022	7	1632	6738977	Community First	14A	LWH	\$4,915.00
2022	7	1632	6780154	Community First	14A	LWH	\$20,000.00
2022	7	1632	6793015	Community First	14A	LWH	\$67,614.00
2022	7	1632	6840526	Community First	14A	LWH	\$8,890.00
2022	7	1632	6840539	Community First	14A	LWH	\$19,640.00
2022	7	1632	6840748	Community First	14A	LWH	\$4,000.00
2022	7	1632	6843807	Community First	14A	LWH	\$4,632.80
					14A	Matrix Code	\$233,212.94
2022	8	1622	6846102	Troquet - CDA Revolving Loan	18A	LWJ	\$110,137.00
2023	8	1648	6846104	Mochi MKE	18A	LWJ	\$50,000.00
					18A	Matrix Code	\$160,137.00
2023	8	1643	6846068	WWBIC	18C	LWC	\$35,000.00
					18C	Matrix Code	\$35,000.00
Total							\$1,088,479.57

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



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2023
 WAJAWATOSA, WI

DATE: 03-25-24
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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity to prevent, prepare for, and respond to Coronavirus	Activity Name	Grant Number	Fund Type	Matrix Code	National Objective	Drawn Amount	
2022	3	1625	6824001	No	Senior Center	B22MC550010	EN	05A	LMC	\$82,000.00	
2022	3	1626	6718938	No	ERAS Senior Network	B22MC550010	EN	05A	LMC	\$1,271.54	
2022	3	1626	6773140	No	ERAS Senior Network	B22MC550010	EN	05A	LMC	(\$24,692.91)	
2023	3	1642	6816891	No	ERAS Senior Network	B23MC550010	EN	05A	LMC	\$23,538.98	
2023	3	1642	6837458	No	ERAS Senior Network	B23MC550010	EN	05A	LMC	\$3,372.02	
										05A Matrix Code	\$85,489.63
2022	4	1628	6718938	No	Vision Forward	B22MC550010	EN	05B	LMC	\$6,002.00	
2023	4	1640	6810008	No	Life Navigators	B23MC550010	EN	05B	LMC	\$25,911.00	
										05B Matrix Code	\$31,913.00
2022	5	1629	6718938	No	Tosa Cares	B22MC550010	EN	05W	LMC	\$6,000.00	
2023	5	1639	6848994	No	Tosa Cares	B23MC550010	EN	05W	LMC	\$6,911.00	
										05W Matrix Code	\$12,911.00
										No Activity to prevent, prepare for, and respond to Coronavirus	\$130,313.63
Total										\$130,313.63	

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	
2023	1	1637	6795097	Comprehensive Plan	20		\$4,597.50	
2023	1	1637	6810218	Comprehensive Plan	20		\$20,546.90	
2023	1	1637	6812901	Comprehensive Plan	20		\$5,276.11	
2023	1	1637	6831235	Comprehensive Plan	20		\$16,103.75	
2023	1	1637	6832388	Comprehensive Plan	20		\$3,475.74	
2023	1	1637	6845887	Comprehensive Plan	20		\$11,691.62	
2023	1	1637	6846144	Comprehensive Plan	20		\$3,477.50	
							20 Matrix Code	\$65,169.12
2021	1	1619	6718938	Administration	21A		\$409.56	
2021	1	1619	6723346	Administration	21A		\$700.00	
2021	1	1619	6727882	Administration	21A		\$2,238.00	
2021	1	1619	6728563	Administration	21A		\$290.31	
2021	1	1619	6730348	Administration	21A		\$871.54	
2021	1	1619	6733978	Administration	21A		\$401.62	
2021	1	1619	6738977	Administration	21A		\$50.00	
2021	1	1619	6746055	Administration	21A		\$7,450.85	
2021	1	1619	6754691	Administration	21A		\$17,234.08	
2021	1	1619	6763303	Administration	21A		\$950.00	
2021	1	1619	6768704	Administration	21A		\$16.24	
2021	1	1619	6770335	Administration	21A		\$8,938.50	
2021	1	1619	6787702	Administration	21A		\$6,833.54	
2021	1	1619	6796493	Administration	21A		\$4,267.66	
2021	1	1619	6803508	Administration	21A		\$1,461.20	
2021	1	1619	6813907	Administration	21A		\$3,989.32	
2021	1	1619	6819122	Administration	21A		\$26.62	
2021	1	1619	6823567	Administration	21A		\$2,787.54	
2021	1	1619	6832761	Administration	21A		\$6,513.21	
2021	1	1619	6837458	Administration	21A		\$3,910.77	
2021	1	1619	6837987	Administration	21A		\$207.96	
2021	1	1619	6845957	Administration	21A		\$5,775.64	
2021	1	1619	6848994	Administration	21A		\$1,250.00	
2021	1	1619	6849037	Administration	21A		\$3,052.06	
							21A Matrix Code	\$79,216.22
2022	2	1624	6730348	MMFHC	21D		\$10,699.11	
2023	2	1636	6848994	MMFHC	21D		\$34,907.14	
							21D Matrix Code	\$45,606.25
Total							21D	\$189,991.59

PR26 - Activity Summary by Selected Grant

Date Generated: 03/25/2024

Grantee: WAUWATOSA

Grant Year: 2023

Formula and Competitive Grants only

Total Grant Amount for CDBG 2023 Grant year B23MC550010 Grant Number = 8997.039.00														
State	Grantee Name	Grant Year	Grant Number	Activity Group	Matrix Code	National Objective	IDIS Activity	Activity to prevent, prepare for, and respond to Coronavirus	Activity Status	Amount Funded From Selected Grant	Amount Drawn From Selected Grant	% of CDBG Drawn From Selected Grant/Grant	Total CDBG Funded Amount (All Years All Sources)	Total CDBG Drawn Amount (All Years All Sources)
WI	WAUWATOSA	2023	B23MC550010	Acquisition	01	LMC	1647	No	Open	\$186,573.00	\$186,573.00		\$300,000.00	\$300,000.00
Total Acquisition										\$186,573.00	\$186,573.00	18.71%	\$300,000.00	\$300,000.00
WI	WAUWATOSA	2023	B23MC550010	Administrative And Planning	20		1637	No	Open	\$50,000.00	\$48,342.46		\$74,692.91	\$73,035.37
WI	WAUWATOSA	2023	B23MC550010	Administrative And Planning	21A		1635	No	Open	\$100,000.00	\$11,274.28		\$100,000.00	\$11,274.28
WI	WAUWATOSA	2023	B23MC550010	Administrative And Planning	21D		1636	No	Completed	\$41,790.00	\$41,790.00		\$41,790.00	\$41,790.00
Total Administrative And Planning										\$191,790.00	\$101,406.74	10.17%	\$216,482.91	\$126,099.65
WI	WAUWATOSA	2023	B23MC550010	Economic Development	18C	LMC	1643	No	Completed	\$35,000.00	\$35,000.00		\$35,000.00	\$35,000.00
Total Economic Development										\$35,000.00	\$35,000.00	3.51%	\$35,000.00	\$35,000.00
WI	WAUWATOSA	2023	B23MC550010	Public Improvements	03B	LMC	1646	No	Open	\$137,500.00	\$58,161.00		\$137,500.00	\$58,161.00
WI	WAUWATOSA	2023	B23MC550010	Public Improvements	03P	LMC	1644	No	Open	\$144,491.00	\$24,045.00		\$144,491.00	\$24,045.00
WI	WAUWATOSA	2023	B23MC550010	Public Improvements	03P	LMC	1645	No	Open	\$152,130.00	\$80,000.00		\$152,130.00	\$80,000.00
Total Public Improvements										\$434,121.00	\$162,206.00	16.27%	\$434,121.00	\$162,206.00
WI	WAUWATOSA	2023	B23MC550010	Public Services	05A	LMC	1638	No	Open	\$82,611.00	\$0.00		\$82,611.00	
WI	WAUWATOSA	2023	B23MC550010	Public Services	05A	LMC	1642	No	Completed	\$26,911.00	\$26,911.00		\$26,911.00	\$26,911.00
WI	WAUWATOSA	2023	B23MC550010	Public Services	05B	LMC	1640	No	Completed	\$25,911.00	\$25,911.00		\$25,911.00	\$25,911.00
WI	WAUWATOSA	2023	B23MC550010	Public Services	05B	LMC	1641	No	Completed	\$6,911.00	\$6,911.00		\$6,911.00	\$6,911.00
WI	WAUWATOSA	2023	B23MC550010	Public Services	05W	LMC	1639	No	Completed	\$6,911.00	\$6,911.00		\$6,911.00	\$6,911.00
Non CARES Related Public Services										\$149,555.00	\$66,644.00	6.68%	\$149,555.00	\$66,644.00
Total 2023										\$997,039.00	\$551,829.74	55.35%	\$1,135,158.91	\$689,949.65
Grand Total										\$997,039.00	\$551,829.74	55.35%	\$1,135,158.91	\$689,949.65



PART I: SUMMARY OF CDBG-CV RESOURCES

01 CDBG-CV GRANT	795,942.00
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	795,942.00

PART II: SUMMARY OF CDBG-CV EXPENDITURES

05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	716,135.00
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	79,807.00
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	795,942.00
09 UNEXPENDED BALANCE (LINE 04 - LINE8)	0.00

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	716,135.00
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	716,135.00
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	716,135.00
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	100.00%

PART IV: PUBLIC SERVICE (PS) CALCULATIONS

16 DISBURSED IN IDIS FOR PUBLIC SERVICES	171,502.00
17 CDBG-CV GRANT	795,942.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	21.55%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	79,807.00
20 CDBG-CV GRANT	795,942.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	10.03%



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	2	1581	6385986	CV-Lutheran Home	05A	LMC	\$10,707.00		
			6410878	CV-Lutheran Home	05A	LMC	\$30,793.00		
			1584	6415178	CV-Senior Center	05A	LMC	\$5,000.00	
			1586	6458757	CV-Eras	05A	LMC	\$3,000.00	
			1587	6407867	CV-Luther Manor	05A	LMC	\$10,567.75	
			6415178	CV-Luther Manor	05A	LMC	\$199.97		
			6417172	CV-Luther Manor	05A	LMC	\$9,999.00		
			6456828	CV-Luther Manor	05A	LMC	\$20,733.28		
			3	1594	6449547	CV3-Life Navigators	05B	LMC	\$19,502.00
			8	1589	6410878	CV-CDA Business Loan	18A	LMJ	\$305,125.00
		11	1590	6449547	CV-WWBIC Business Loan Program	18C	LMC	\$100,000.00	
		11	1582	6452279	CV-Tosa Community Food Pantry	05W	LMC	\$1,000.00	
			1585	6406320	CV-Tosa Cares	05W	LMC	\$15,000.00	
		12	1583	6386445	CV-Life Navigators	05B	LMC	\$12,500.00	
		13	1588	6441485	CV-Elena's House	03T	LMC	\$10,000.00	
		16	1599	6456828	CV3 Luther Manor	05A	LMC	\$9,999.00	
			1605	6474653	CV3 Luther Manor	05A	LMC	\$10,001.00	
		17	1605	6486637	CV3 - Senior Center	05A	LMC	\$2,500.00	
			1608	6527559	CV3 WWBIC Business Loan	18C	LMC	\$139,508.00	
		Total							\$716,135.00

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	2	1581	6385986	CV-Lutheran Home	05A	LMC	\$10,707.00		
			6410878	CV-Lutheran Home	05A	LMC	\$30,793.00		
			1584	6415178	CV-Senior Center	05A	LMC	\$5,000.00	
			1586	6458757	CV-Eras	05A	LMC	\$3,000.00	
			1587	6407867	CV-Luther Manor	05A	LMC	\$10,567.75	
			6415178	CV-Luther Manor	05A	LMC	\$199.97		
			6417172	CV-Luther Manor	05A	LMC	\$9,999.00		
			6456828	CV-Luther Manor	05A	LMC	\$20,733.28		
			3	1594	6449547	CV3-Life Navigators	05B	LMC	\$19,502.00
			11	1582	6452279	CV-Tosa Community Food Pantry	05W	LMC	\$1,000.00
		1585		6406320	CV-Tosa Cares	05W	LMC	\$15,000.00	
		12	1583	6386445	CV-Life Navigators	05B	LMC	\$12,500.00	



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Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2020	13	1588	6441485	CV-Elena's House	03T	LMC	\$10,000.00
	16	1599	6456828	CV3 Luther Manor	05A	LMC	\$9,999.00
			6474653	CV3 Luther Manor	05A	LMC	\$10,001.00
		1605	6488637	CV3 - Senior Center	05A	LMC	\$2,500.00
Total							\$171,502.00

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	1	1580	6385986	CV-Administration	21A		\$2,126.48
			6410878	CV-Administration	21A		\$10,939.43
			6449547	CV-Administration	21A		\$20,260.00
			6463039	CV-Administration	21A		\$1,836.32
			6525084	CV-Administration	21A		\$23,293.30
			6542781	CV-Administration	21A		\$970.47
	20	1611	6542781	CV3-Administration	21A		\$2,725.57
			6555443	CV3-Administration	21A		\$2,790.38
			6566815	CV3-Administration	21A		\$4,839.07
			6581899	CV3-Administration	21A		\$3,797.87
			6609815	CV3-Administration	21A		\$6,228.11
Total							\$79,807.00