

## **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.

Waukesha County has prepared its Consolidated Annual Performance and Evaluation Report (CAPER) covering the January 1 – December 31, 2024 program year in accordance with the US Department of Housing and Urban Development. The CAPER will cover primarily the two US Department of Housing and Urban Development (HUD) entitlement grants received by Waukesha County, specifically the Community Development Block Grant Program (CDBG) and the HOME Investment Partnership Program (HOME). Since Waukesha County does not directly receive Emergency Shelter (ESG) or HOPWA Housing Opportunity for Persons with AIDS funds, those programs are not described in detail in the CAPER. Waukesha County received a 2024 CDBG grant of \$1,471,411, and a HOME grant of \$1,342,415.93.

Some highlights of 2024 include:

#### **HOUSING**

- The HOME Consortium continued its new Tenant Based Rent Assistance program, which helped to house 15 families who had been homeless or at risk of homelessness by the end of 2024.
- 32 families achieved their dream of homeownership in the four-county area using our Downpayment Assistance or Purchase-Rehab Programs.
- The City of Waukesha’s Landmark Paint and Repair program provided funding for exterior repairs to 23 historic homes.
- 43 families rehabbed their homes and brought them up to local code with HOME and CDBG Rehab programs.
- Habitat for Humanity started a new homeowner rehabilitation program that helped 5 homeowner make repairs on their homes.
- Habitat for Humanity finished construction on 6 of the 11 HOME funded houses at Domenica Park in Waukesha, and 6 low-income homebuyers moved into their new homes.

#### **PUBLIC SERVICES AND NRSA ACTIVITIES**

- 454 people were offered overnight shelter in Waukesha County.

- 210 adults received homeless prevention and homeless case management services.
- 3,196 people received meals from the shelter meal programs.
- 21 Seniors were assisted with meals and household chores.
- 2,257 Seniors participated in activities at the City of Waukesha Senior Center
- 513 Seniors and disabled adults were given rides in taxi and collaborative transportation programs.
- 259 adults used the bus passes available through the Hope Center for transportation to work or work-related activities.
- 2,228 non-insured or underinsured adults were provided health or dental care at the free health clinics.
- 44 residents of the Tower Hill neighborhood participated in a crime prevention program.
- 516 adults used the Hope Center Clothing Shop

**Economic Development**

- 27 current and potential business owners received technical assistance and training on business plans and expansion.
- 13 individuals with IDD participated in workforce development programs.
- 6 businesses received façade grants in downtown Waukesha for exterior improvements.

**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
Administration and Planning	Administration and Planning	CDBG: \$ / HOME: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	300	474	158.00%			

Administration and Planning	Administration and Planning	CDBG: \$ / HOME: \$	Other	Other	0	0		0	0	
Economic Development	Non-Housing Community Development	CDBG: \$	Facade treatment/business building rehabilitation	Business	10	19	190.00%			
Economic Development	Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	20	283	1,415.00%	39	33	84.62%
Improve and Revitalize NRSAs	Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	5315	9299	174.96%	1388	1020	73.49%
Improve and Revitalize NRSAs	Non-Housing Community Development	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	0	0		0	0	
Improve and Revitalize NRSAs	Non-Housing Community Development	CDBG: \$	Overnight/Emergency Shelter/Transitional Housing Beds added	Beds	0	0		0	0	
Improve and Revitalize NRSAs	Non-Housing Community Development	CDBG: \$	Homelessness Prevention	Persons Assisted	3750	1655	44.13%	225	210	93.33%
Improve Public Facilities and Infrastructure	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	20000	21654	108.27%	6121	2947	48.15%

Improve Public Facilities and Infrastructure	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0				
Improve Public Facilities and Infrastructure	Non-Housing Community Development	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	0	716		34	74	217.65%
Improve Public Facilities and Infrastructure	Non-Housing Community Development	CDBG: \$	Overnight/Emergency Shelter/Transitional Housing Beds added	Beds	0	0		0	0	
Maintain and Expand Housing Affordability	Affordable Housing	CDBG: \$ / HOME: \$	Rental units constructed	Household Housing Unit	175	78	44.57%	4	0	0.00%
Maintain and Expand Housing Affordability	Affordable Housing	CDBG: \$ / HOME: \$	Rental units rehabilitated	Household Housing Unit	50	36	72.00%	4	0	0.00%
Maintain and Expand Housing Affordability	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Added	Household Housing Unit	50	10	20.00%	4	6	150.00%
Maintain and Expand Housing Affordability	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	445	185	41.57%	95	43	45.26%

Maintain and Expand Housing Affordability	Affordable Housing	CDBG: \$ / HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	450	243	54.00%	40	37	92.50%
Maintain and Expand Housing Affordability	Affordable Housing	CDBG: \$ / HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	36	55	152.78%	13	15	115.38%
Public Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	30725	44958	146.32%	2996	6906	230.51%
Public Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	1600	2897	181.06%	250	454	181.60%
Public Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Overnight/Emergency Shelter/Transitional Housing Beds added	Beds	0	0		0	0	

Public Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Homelessness Prevention	Persons Assisted	0	378				
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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.**

All 2024 activities were consistent with the approved Consolidated Plan, meet HUD strategic plan goals and objectives and concentrated resources to areas of high priority with emphasis on serving identified Neighborhood Revitalization Strategy Areas. Our additional allocations for CDBG-CV funding continued to be expended in 2024, and we expect those funds to be completely expended by 3/31/25. Our HOME program funding expenditures slowed down in 2021 and 2022, but started to pick up in 2023 and 2024. DPA and Rehab loans increased in 2024, but are still below the numbers we had been used to seeing pre-COVID. HOME funded housing projects have been the slowest area to recover. The HOME Consortium was able to fund two housing projects in 2022, one of which completed in 2024 and the other will be completed by 12/31/25. One HOME development project was approved in 2024, a two unit townhome developed by Habitat for Humanity. Excess HOME funding from 2020, 2021 and 2022 will be targeted toward projects that can complete in 2024 and 2025.

The Priorities/Categories identified in the Consolidated Plan are: Maintain and Expand Housing Affordability, Improve Public Facilities and Infrastructure, Economic Development, Public Services, Improve and Revitalize NRSAs, and Planning and Administration. All of the categories were addressed in the 2024 year, and most of the goals were met or exceeded.

## 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
White	11,646	87
Black or African American	1,445	6
Asian	421	0
American Indian or American Native	128	0
Native Hawaiian or Other Pacific Islander	36	0
<b>Total</b>	<b>13,676</b>	<b>93</b>
Hispanic	1,680	33
Not Hispanic	11,996	60

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

### Narrative

In Waukesha County, minority residents comprise 6.1% of the County's population. HUD defines areas of racial or ethnic concentration as geographical areas where the percentage of residents who are racial or ethnic minorities is 10 percentage points higher than the percentage in the county overall. The County has seven census tracts with high concentrations of racial and ethnic minority populations. Hispanic residents account for the majority of minority population in 6 out of the 7 census tracts, with Asian residents being the majority minority population in one census tract. The disproportionately greater needs of racial and ethnic minority groups may include housing problems, severe housing problems, and cost burdens. These needs vary based on specific racial and ethnic group.

In low- and moderate- income communities, racial, ethnic, and socio-economic diversity could provide an opportunity for enhancing the quality of life for residents. The County has three Neighborhood Revitalization Strategy Areas. Phoenix Heights, Haertel Field, and West Side, all located in the City of Waukesha. These areas are developed around low-to moderate income Census block groups, contain high concentration of racial and ethnic minorities (primarily Hispanic), and seek to engage community residents and target asset based community development in these regions.

You can see this reflected in the table showing the racial and ethnic makeup of the families assisted with CDBG. Black or African American residents of Waukesha County account for 1.4% of the total population of the County, according to the 2015 American Community Survey 5-Year Estimates. 6.2% of those

served with CDBG funds were Black or African American. Hispanics account for 4.5% of the population of Waukesha County, but 10.3% of those served with CDBG fall into this ethnic category.

## 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	1,511,411	1,163,308
HOME	public - federal	1,542,415	947,896

Table 3 - Resources Made Available

### Narrative

The CDBG "Resources Made Available" includes both Waukesha County's regular 2024 CDBG allocation dollars, Revolving Loan and Program Income received. The HOME "Resources Made Available" includes Waukesha County's regular 2024 HOME allocation dollars, and program income received.

### Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Countywide			Other
HAERTEL FIELD	33	33	
HOME Consortium			Other
PHOENIX HEIGHTS	33	33	
WESTSIDE NRSA	34	34	

Table 4 – Identify the geographic distribution and location of investments

### Narrative

Waukesha County identified three NRSAs in the City of Waukesha in 1999. The County has continued to designate the three NRSAs as high priority areas for funding and community development, and created a new NRSA plan for 2020-2024, which was submitted with our Consolidated Plan. Up to 10% of the total CDBG allocation (including potential program income) each year is targeted toward Community Based Development Organizations (CBDOs) who concentrate their services in one or more of these three areas. Waukesha County has chosen to divide up the allocation equally between all three of the NRSAs (approximately 33 percent for each) because the majority of the nonprofits who provide services in the NRSAs work with clients in all three of the areas. Economic development is the highest priority for funding in the NRSAs, including services that assist low and moderate income families in finding and maintaining jobs. Another high priority is crime prevention, and public services activities in a NRSA is typically funded as well.

The Phoenix Heights, Haertel Field, and West Side Neighborhood Revitalization Strategy Areas (NRSAs) include downtown Waukesha and the surrounding Central City. Please see the maps of each NRSA. Almost 9,000 residents live in these three neighborhoods, encompassing about 12% of the entire

population of the City of Waukesha. Recent trends within these neighborhoods include a growing diverse population of Latino and African American residents and an increasing concentration of residents age 65 and over.

CDBG funds nonprofit organizations (CBDOS) who directly benefit clients/households located in three HUD approved Neighborhood Revitalization Strategy Areas (NRSA). In 2024, Waukesha County funded 3 nonprofit agencies to deliver services in the NRSA areas, for a total expenditure of \$168,678. The total number of clients served was 1,020 people, with programs such as employment training, free or reduced price medical and dental services, free clothing and meals, and crime prevention services. Please see the attached NRSA 2024 Summary Report for more information about NRSA key indicators.

## 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.**

Federal resources provide gap financing, assistance to meet client needs or are used as leverage to secure other resources. Waukesha County requires that applicants identify in their application other resources received to leverage CDBG funding both for the agency and for the specific activity seeking funds. The County rarely fully funds any program or project, instead it requires leverage ranging from 1:1 in program service dollars, to 3:1 in economic development loans, to a typical 10:1 or larger ratio for housing development. Program income funds generated during this Action Plan period are leveraged to increase services to low and moderate residents within the jurisdiction.

The HOME program is similar in that HOME funding is generally considered gap financing, particularly for housing development projects. The exception to this is the Housing Rehabilitation program, which may be the sole source of the rehab being undertaken. The Downpayment Assistance program leverages the private lender mortgage on a \$10,000 to average \$200,000 mortgage. HOME assistance to developers depends on the size of the project, but is rarely granted at more than \$100,000 of HOME per unit. Leverage for development projects is typically a 10:1 ratio minimum, but is often much higher.

Waukesha County's HOME Match requirement for 2024 was \$168,432.18.

<b>Fiscal Year Summary – HOME Match</b>	
1. Excess match from prior Federal fiscal year	855,345
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	855,345
4. Match liability for current Federal fiscal year	168,432
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	686,913

**Table 5 – Fiscal Year Summary - HOME Match Report**

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match

Table 6 – Match Contribution for the Federal Fiscal Year

**HOME MBE/WBE report**

Program Income – Enter the program amounts for the reporting period				
Balance on hand at begin-ning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
509,816	347,697	349,861	144,240	507,652

Table 7 – Program Income

<b>Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period</b>						
	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
<b>Contracts</b>						
Dollar Amount	48,481	0	0	1,161	42,498	4,823
Number	4	0	0	1	2	1
<b>Sub-Contracts</b>						
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0
	Total	Women Business Enterprises	Male			
<b>Contracts</b>						
Dollar Amount	48,481	4,823	43,659			
Number	4	1	3			
<b>Sub-Contracts</b>						
Number	0	0	0			
Dollar Amount	0	0	0			

**Table 8 - Minority Business and Women Business Enterprises**

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

**Table 9 – Minority Owners of Rental Property**

<b>Relocation and Real Property Acquisition</b> – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
Parcels Acquired		0		0		
Businesses Displaced		0		0		
Nonprofit Organizations Displaced		0		0		
Households Temporarily Relocated, not Displaced		0		0		
Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

**Table 10 – Relocation and Real Property Acquisition**

## CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	13	15
Number of Non-Homeless households to be provided affordable housing units	74	85
Number of Special-Needs households to be provided affordable housing units	0	0
<b>Total</b>	<b>87</b>	<b>100</b>

Table 11 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	13	15
Number of households supported through The Production of New Units	4	6
Number of households supported through Rehab of Existing Units	30	43
Number of households supported through Acquisition of Existing Units	40	36
<b>Total</b>	<b>87</b>	<b>100</b>

Table 12 – Number of Households Supported

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

We exceeded our affordable housing goals for 2024 in all categories except DPA, which is still recovering from the housing market decline from COVID-19.

**Discuss how these outcomes will impact future annual action plans.**

Future annual plans should not be impacted. We have seen a recovery in all of our programs in the last two years and we expect that to continue.

**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.**

<b>Number of Households Served</b>	<b>CDBG Actual</b>	<b>HOME Actual</b>
Extremely Low-income	0	15
Low-income	5	15
Moderate-income	23	42
<b>Total</b>	<b>28</b>	<b>72</b>

**Table 13 – Number of Households Served**

### **Narrative Information**

Waukesha County tries to serve all low and moderate income levels with its affordable housing programs. In 2024, 15% of the clients served with HOME were extremely low income, which were TBRA clients. 20% of the clients were low income, which are a mix of homeowners using the rehab programs and a few people purchasing a home with our downpayment assistance program. Finally, 65% of the affordable housing clients were moderate income. The majority of these clients used our homeowner rehab program, and our downpayment assistance program. These statistics have been consistent for many years.

Waukesha County and the HOME Consortium try to address “worst case needs”, and meeting the needs of persons with disabilities, in a variety of ways. Worst-case housing needs are defined as low-income renter households who pay more than half of their income for rent, live in seriously substandard housing, which includes homeless people, or have been involuntarily displaced. The HOME Consortium encourages developers of new housing to create units available for renters and homeowners at or below 30% of the CMI, in part by awarding projects with that unit makeup more points in scoring. In fact, all of the rental project funding with HOME dollars in the last five years have been for units at that level. Priority is given to projects that house formerly homeless individuals, and people with disabilities. In 2024, 1 housing development project that was awarded HOME funds in 2023 finished construction. Impact Seven was awarded \$561,000 in HOME funds for a new project in Ozaukee County, which created 18 new units of housing for adults with developmental disabilities, 11 of which are HOME funded units. All units are now occupied.

Habitat for Humanity was awarded \$880,000 in HOME funds and \$394,000 in CDBG (for acquisition) for a new subdivision in the City of Waukesha called Domenica Park. This project will create new homes for 20 homeowners, 11 of which will be HOME units. Habitat completed construction on 6 of the HOME

units in 2024 and low income homeowners have moved in. The remaining 5 HOME units will be completed in 2025.

## **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**

Waukesha County is a participant in the Wisconsin Balance of State Continuum of Care Committee on Homelessness, though it's local Continuum of Care, the Housing Action Coalition of Waukesha County. The WIBOSCOC conducts the point-in-time count twice per year in January and July. This count is intended to include persons that are homeless and are living in emergency shelters, transitional housing, safe havens for the homeless, domestic violence shelters, or who are unsheltered living on the streets or any other place not mean for human habitation.

The Housing Action Coalition reached out to homeless persons (especially unsheltered persons) through meal programs, day programs, drop-in centers, and hospitals. In addition, information is collected annually using the point in time survey form and is then summarized. The point in time surveys are one on one interviews held with the consumers. In addition, in 2020 HAC formed a new "HEART Team," which is a homeless outreach team consisting of staff from HAC, NAMI, Waukesha County Mental Health, Pro-Health Care, and City of Waukesha police department officers. This outreach team has focused on working with the chronic homeless population located in downtown Waukesha. A rotating group of people conduct outreach every week, always with a City of Waukesha police officer. They have made great strides in connecting homeless individuals with resources, including permanent housing using the County's TBRA program, which housed 15 families in 2024.

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

Waukesha County will continue to provide assistance to nonprofit agencies to develop and implement a coordinated assessment system throughout the jurisdiction. Waukesha County will continue to support homeless service providers, funders, and stakeholders who recognize the need to shift focus and resources from short-term, emergency shelter to long-term, permanent housing, in order to end homelessness.

In 2024, Waukesha County expended a total of \$155,097 in CDBG for emergency shelter, drop-in shelter, winter overflow shelter, homeless prevention or case management for homeless persons, which provided services or overnight shelter to 798 people. In addition, Waukesha County expended \$89,181 on community meal programs that primarily serve the homeless population in the County, feeding 717 people.

### **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**

Besides the direct allocation of funds for the operation of homeless shelters, CDBG funds prevent homelessness through funding nonprofit organizations that offer evening free meal programs, free clothing at the drop-in center, free food at the food pantries, free and reduced price medical and dental services for adults and children, case management and counseling, childcare to assist low income households, and economic development to create low and moderate income jobs. Some of the nonprofits that CDBG funded for homeless prevention activities in 2024 include, the Hope Center, Safe Babies, Healthy Families (through Easter Seals), The Salvation Army, The Women's Center, the Food Pantry of Waukesha County, ERAs, and the Waukesha Free Clinic. In addition, Waukesha County and the Housing Action Coalition have been working with the County's jail staff to create better discharge plans for people leaving correction programs and institutions so they do not become homeless.

**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**

Waukesha County has worked hard to try to implement a Housing First model in the community. This effort was decided by the community of nonprofit service providers and their funders, as a better way to support homeless service providers, funders, and stakeholders who recognize the need to shift focus and resources from short-term, emergency shelter to long-term, permanent housing, in order to end homelessness. Waukesha County and the Housing Action Coalition support the adoption of the Housing First model by all shelter, transitional and permanent housing providers. However, the reality is that affordable permanent housing is extremely difficult to find in Waukesha County. The need for it is great, and Waukesha County is very supportive of using HOME and CDBG funding for the creation of more affordable rental housing.

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

### **Actions taken to address the needs of public housing**

The WHA completed the updates to the plumbing, bathrooms, and kitchens at its 6 story high rise. This project has taken many years to complete due to lack of Capital Funds. WHA has concentrated on doing unit updates on homes within its Scattered Site PH as units become available. WHA has also completed roofing at all of the scattered site units. WHA's 5 year capital plan addresses elevator and window replacement at Saratoga Heights. The WHA owns 93 buildings which consist of 1 6-story high rise which houses 115 households, and 92 duplexes, quad-plexes and single family homes scattered throughout the City of Waukesha. HUD has provided more funding for Capital Needs in last few years, which has helped with some of the backlog WHA had with its aging housing stock. While they have a long way to go, they have made much progress with capital improvements over the last couple of years.

WHA had worked with Workforce Development and La Casa de Esperanza for employment training and opportunities, however due to little interest from residents, there has not been much activity with this respect. WHA continues to make its residents aware of any opportunities being offered.

The Waukesha Housing Authority continues to seek help with residents which have developmental disabilities as well as those who are homeless. The WHA has seen a substantial rise in evictions of families who were homeless, or those with developmental disabilities from its housing units due to the fact that they are not receiving or not accepting proper services from providers. All residents under HUD regulation are to follow the same rules. While accommodations are granted to those with disabilities, they are not continual exceptions, but rather a 1 time warning with an opportunity to correct the situation. Without continual help this population will not be able to secure long term housing. Resources available to WHA are minimal, which is unfortunate as these families are desperate need of housing.

WHA is waiting for HUD Headquarters to approve the sale of 3 properties, which are in need of repair or are not marketable for WHA due to several factors. WHA has buyers waiting, but has not received the final approval to remove them from its inventory. If the sale is approved, the proceeds would be used to improve other Public Housing Properties.

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

WHA encourages tenants to work, and contacts those who are not working when job fairs are being held at Workforce Development. Residents are notified of changes to programs and meetings are held for comment, however very few participants attend. WHA has not offered an FSS program due to funding constraints. Also, with the continual cuts to administrative funds, it would be difficult to fund a staff person for this position. WHA current staff is not capable of performing its current duties in addition to the multiple hours that are needed to properly administer an FSS program.

The Waukesha Housing Authority has been doing outreach to landlords within Waukesha County. WHA had sent a mailing to every landlord in the City/County of Waukesha explaining the program and how it benefits clients as well as how it could be a benefit for them. WHA asked for feedback and also asked if landlords would be interested in a presentation. WHA received 2 responses from a landlord who currently participates. They said they would like to see payment for damage or non-payment of rent when a tenant is evicted. WHA receives many calls in reference to ADA units available within the County. With the rising cost of rent in Waukesha County, it is getting more difficult for voucher holders to find units that will fit the allowed maximum rent, which is set by HUD each year. WHA finds many voucher holders living in Waukesha County for one year and then moving to a different jurisdiction. A couple of reasons noted from people who exercise their rights to for portable are: they have no support system here, so move closer to family and friends, unit options are limited, and public transportation is limited or non-existent in the County of Waukesha. Many cannot afford a vehicle, which makes it impossible for them to live anywhere that public transportation is not readily available. Due to lack of funds, the WHA has not been able to add additional households to the Section 8 Voucher program.

### **Actions taken to provide assistance to troubled PHAs**

No troubled PHAs in the HOME Consortium area.

## **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 2024, the Parks and Land Use Department engaged in the following activities which addressed housing issues or which promoted or authorized multi-family or affordable housing within Waukesha County:

- Co-hosted a neighborhood open house with the City of Waukesha to consider mixed density and a mix of housing types for a large scale re-development project consistent with the recommendations of the City's Housing Plan.
- Filed land use plan amendment application to allow for re-development of excess county owned lands in the City of Waukesha for mixed residential uses.
- Approved zoning ordinance amendments and a subdivision plat to allow for lots as small as 10,000 sq. ft. within a 152 acre development site in the Town of Delafield.
- Approved zoning ordinance amendments to increase the size of in-law dwelling units to 1000 sq. ft. to allow for more multi-generational and age in place housing.

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

The Waukesha County Executive appoints four citizens to the Board of Directors of the Housing Action Coalition. Two County staff were appointed Board members by the County Executive to HAC during 2024, including Brad Haas the Human Services Supervisor, who is the Board President. The Housing Action Coalition (HAC) acts as the Continuum of Care for Waukesha County. HAC is a strong force for meeting underserved needs, by bringing in more funding to the County for these services, and by helping the nonprofit member organizations collaborate more effectively. Other members include; Catholic Charities, Independence First, Metropolitan Milwaukee Fair Housing Council, ProHealth Care, Safe Babies Healthy Families, St. Joseph's Medical Clinic, SWERPC, Waukesha County UW Cooperative Extension, Interfaith Senior Programs, Hebron House of Hospitality, Hope Center, National Alliance of the Mentally Ill (NAMI), Waukesha County Mental Health Association, The Women's Center of Waukesha County, Lutheran Social Services of Wisconsin, Habitat for Humanity, Salvation Army of Waukesha County, Richard's Place, and the Waukesha Housing Authority. The member organizations work together to identify underserved needs and to try to meet them, collectively.

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

Waukesha County contracts with a housing inspector who is a licensed lead inspector and risk assessor by the State of Wisconsin. The Purchase-Rehab and Rehab programs funded through HOME and CDBG require that all lead hazards, which are identified in a Risk Assessment, are corrected as part of the

rehabilitation process and final clearance tests are performed to ensure the home is lead safe.

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

Waukesha County targets persons living below the poverty level with many of its CDBG funded programs. Subgrantees such as the Waukesha Food Pantry, meal programs at the HOPE Center and Salvation Army and all funded homeless/domestic abuse/pregnancy shelters all provide services to alleviate poverty or assist persons currently in poverty.

CDBG funds Hebron House of Hospitality who operates in conjunction with other agencies an expediting Social Security Disability (SSI-D) program to assist disabled persons in obtaining Social Security payments. Other CDBG subgrantees, such as The Women’s Center, Easter Seals, Journey 21 and the Down Syndrome Association of WI, provide specialized employment, training, job skill building or employment opportunities to victims of domestic abuse, bilingual, mentally, developmentally or physically disabled persons.

Finally, Waukesha funds economic development projects which create low and moderate income jobs in the County through its long running Revolving Loan Fund, and through partnership with the Wisconsin Women's Initiative Business Corporation, to target microenterprises who wish to expand or locate into downtown Waukesha. In addition, WWBIC assisted small businesses with business plan development and growth strategies, which will hopefully create more low/mod jobs in the future.

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

Waukesha County Community Development staff have participated in and outreached to a number of institutional structures relating to existing programs and to overcome gaps in the community in 2024. Staff participated in various boards, committees, collaborations and coalitions that address various issues in the community, including:

- 2) Housing Action Coalition Board of Directors
- 3) HEART Team (homeless outreach team)
- 4) FEMA EFSP local Board Member (7th year)
- 5) United Way Safe and Stable Homes Advisory Council
- 6) National Community Development Association (NCDA)

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

Waukesha County is an active participant in the local Continuum of Care, known as the Housing Action Coalition. The County continued to take an active role in 2024, both in terms of leadership and funding. The County Executive appoints 4 members to the Board of Directors, two of whom are County staff.

One of the purposes of the Housing Action Coalition is to increase the coordination between public entities, private organizations and businesses, and social service agencies. Homelessness is a community problem that needs to be solved by the entire community, not a small group of service providers. Increasing the public and private membership on the Board has helped to bridge these gaps and connect people and organizations from different fields around the issue of homelessness. The HAC was able to open the new permanent location for the winter overflow shelter in winter of 2022. The winter overflow shelter and served 74 clients in 2024.

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

2024 was the fifth and final year of the 2020—2024 Regional Analysis of Impediments. Every year, Waukesha County informs all municipalities in the four county region about the impediments identified in the AI, and offers suggestions on how to address them. Waukesha County collects information at the end of the year from the municipalities in the four county region about their efforts. All of the responses are attached to this CAPER, but highlights from that report include:

- The City of Oconomowoc is working with a consultant to promote the redevelopment of mixed-use buildings in their downtown to include high density apartments
- The City of Waukesha provided financial incentives for affordable housing developments, and waived impact fees for those projects
- The City of West Bend continued to expand sanitary sewer services to support higher density residential development
- The City of Delafield adopted an ordinance in 2024 that allows the City the opportunity to waive capacity limitations as part of a conditional use permit process for CLA/group home projects
- The City of Jefferson designated mixed use development areas near City industrial parks to permit near work live arrangements for employees in 2024
- The Village of Menomonee Falls approved a new mixed income housing project which will allow a mix of single family and duplex homes on lots ranging from 5000 sq ft to 16,000 sq ft
- The City of New Berlin continued their support of their housing trust fund, downpayment assistance grant fund, and also created and disseminated information about the benefits of affordable housing in the community
- The City of Waukesha completed a new 2024 Housing Study which outlines the need for more affordable and workforce housing in the City

## **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**

Waukesha County conducts “desk monitoring” on a regular basis for all of our programs. Staff produce monthly expenditure reports to determine if subgrantees are undertaking projects and making progress in meeting timeliness requirements. Waukesha County also receives a written report six months into the program year and a final year end report from every subgrantee. In addition, Waukesha County collects MBE/WBE, Section 3, and prevailing wage reports from applicable agencies. Finally, Waukesha County requests information from every city and village in the HOME Consortium area regarding furthering fair housing and addressing impediments to fair housing, on an annual basis.

On site monitoring of activities was conducted through a combination of Teams meetings and on site visits. Staff monitored 5 CDBG subgrantees (Haase House, Hebron Housing Services, Journey 21, Parents Place and the City of Waukesha), 1 CDBG-CV subgrantee (Waukesha Food Pantry), and 8 HOME rental housing projects. Monitoring included virtual Teams meetings, on site meetings, tours and inspections, and an in depth analysis of program files and procedures.

## **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.**

Waukesha County followed federal requirements related to Citizen Participation and our Citizen Participation Plan for publishing information in the official newspaper of the county for the notice of Public Hearings and/or Public Comment periods in 2024 for:

- 1) Availability of Application for 2025 CDBG, and technical assistance training session for the application
- 2) Proposed Allocation for 2025 HOME and CDBG, including public comment period and public hearing
- 3) 2024 Annual Plan (And as Amended to include actual allocation amounts)

4) 2023 CAPER, including public comment period (Wednesday, March 13, 2024 through Wednesday, March 27, 2024) and public comment period. No public comments were received.

5) 2024 CAPER, including public comment period (Thursday, March 13, 2025 through Thursday, March 27, 2025), and virtual public comment period. No public comments were received.

Public Notices are published in the Waukesha County Freeman, the County's official newspaper for projects in Waukesha County, and in the official newspapers of Jefferson, Ozaukee and Washington Counties for projects or developments specific to those counties. In addition, Waukesha County publishes notices of these events and reports on its website, and emails its current subgrantee list a notification for some of the above listed events and reports.

**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.**

Waukesha County has a Strategic Plan for 2020--2024, and all objectives are in line with that new plan.

**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-50 - HOME 24 CFR 91.520(d)**

### **Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations**

Please list those projects that should have been inspected on-site this program year based upon the schedule in 24 CFR §92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

Waukesha County staff monitored 8 HOME development projects (Hebron House Main St Apartments, New Berlin Senior and Family Apartments, Movin' Out Globe Apartments and Oconomowoc School Apartments, Lutheran Social Services Grandview Apartments, Family Promise in Washington Co, Impact Seven Lakeview Terrace Apartments and Village Point Commons) in 2024. Monitoring included virtual Teams meetings, on site meetings, tours and inspections, and an in depth analysis of program files and procedures. Waukesha County has new staff in place who attended HUD trainings and conducted their first monitoring in 2023. Waukesha County is now on track to monitor all HOME projects in the year required.

The eight projects that were monitored had few issues identified. Some projects were cited for affirmative advertising/marketing issues (for not advertising in Milwaukee Metropolitan area, specifically in the Milwaukee Courier and Milwaukee Times, per our Subgrantee Agreements). All projects have rectified this by placing ads for tenants in these newspapers. A few projects had minor repairs noted in the inspection that were fixed by the property owners.

### **Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 24 CFR 91.520(e) and 24 CFR 92.351(a)**

Waukesha County requires that HOME funded developers use affirmative marketing practices to encourage residents of the Milwaukee metropolitan statistical area to increase their awareness of available housing, and to facilitate access to housing opportunities. Affirmative marketing means removing barriers to housing choice, such as encouraging and providing language access to housing programs and making households aware of opportunities outside of their neighborhoods or cities.

Waukesha County requires developers and owners of HOME funded rental units to conduct affirmative marketing for the prospective tenants of their units. We include language detailing this in all of our contracts, and we contact all developers before the units are marketed to let them know that the HOME funding carries with it a responsibility to use affirmative marketing practices. Waukesha County expects that developers will create and implement a marketing plan that ensures that eligible persons from all racial, ethnic and gender groups are given the opportunity to reside in the HOME funded project.

We require that all developers/owners complete a multi family affirmative marketing plan using the

HUD template, and return it to us for review before any marketing of their units begins. As part of this plan, we require that owners advertise the available units in the Milwaukee Times, or the Milwaukee Courier, and we also encourage ads to be placed in a wider circulation paper that serves the greater Milwaukee area. Jefferson, Ozaukee, Washington and Waukesha Counties are all considered a part of the Milwaukee metropolitan statistical area, because they are a part of the HOME Consortium, and must advertise in the greater Milwaukee region.

In addition, we require HOME and CDBG Program sub-recipients, contractors and subcontractors to take affirmative steps to use MBE's and/or WBE's in HOME and CDBG funded projects to the best of their ability. If requested the County provides training, guidance and information to assist contractor in complying with MBE, WBE and Section 3 marketing and outreach, recordkeeping and reporting requirements.

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

In 2024, Waukesha County received a total of \$347,696.70 in HOME program income by category as follows:

<u>Source</u>	<u>Repayment</u>	<u>Amount</u>
Downpayment Assistance	Recaptured funds	\$ 45,000.00
Housing Rehabilitation	Loan repayment	\$ 191,450.96
Multifamily Development	Loan repayment	\$ <u>111,245.70</u>
		\$ 347,696.70

Waukesha County used program income to fund 1 Home Development Loan. Program Income is used to fund projects before the general allocation is used, per federal regulations.

**Describe other actions taken to foster and maintain affordable housing. 24 CFR 91.220(k) (STATES ONLY: Including the coordination of LIHTC with the development of affordable housing). 24 CFR 91.320(j)**

Waukesha County and the HOME Consortium use all of their HOME funds (with the exception of Admin funding) to foster and maintain affordable housing. The majority of the funding is used for the HOME Consortium's three "Core Programs" of Downpayment Assistance, Homeowner Rehabilitation Loans, and a Purchase-Rehabilitation Program. The HOME Consortium's TBRA program is allocated \$300,000 per year. That program served 15 very low income tenants in 2024. 15% of the annual allocation is set aside for CHDOs, and the remainder is used for non-CHDO housing development.

Waukesha County committed \$300,000 in Downpayment Assistance funding to homebuyers in the four county HOME Consortium area in 2024. The DPA program offers up to \$10,000 in assistance for downpayment or closing costs in a declining balance, forgivable loan. Homeowners who remain in the home for 5 years have their loan forgiven. This program offers a direct and very effective way to eliminate one of the major barriers to affordable housing—cost. One condition of the program is attending homeownership counseling classes with one of the HOME Consortium’s approved counseling agencies. The cost of the classes is covered by the HOME program and is an essential tool in helping homebuyers obtain education about the homebuying process and all of the choices available. 32 homebuyers used this program to purchase homes. This was an increase from 2023, but still less than a normal program year, likely due to COVID-19 effects in the market place, including a lack of housing stock for sale, and high prices for the small amount of homes listed for sale.

Waukesha County committed \$250,000 to the Homeowner Rehabilitation program in 2024. This program offers no interest, deferred loans up to \$20,000 for home repairs to existing low and moderate owned homes. 11 low and moderate income homeowners used this program to address code violations and rehab areas of their homes.

Finally, Waukesha County and the HOME Consortium committed \$175,000 to the Purchase-Rehabilitation program in 2024. This program is a combination of Downpayment Assistance and Rehab necessary to bring a home to be purchased to code compliance. Homebuyers can receive up to \$5,000 in Downpayment Assistance, and up to \$17,500 in a rehabilitation loan, all at closing. Homeowners have 6 months to complete the work on their home. 4 Homebuyer used this program in 2024.

Besides funding of activities to foster and maintain affordable housing, Waukesha County staff attended meetings of the Waukesha Housing Action Coalition, made up of local agencies and individuals advocating for affordable housing, developing the Continuum of Care and receiving federal/state funding for homeless and emergency needs. Community Development staff are also actively involved in a new collaboration of local funders such as the United Way, the Greater Milwaukee Foundation and the Waukesha Community Foundation, named Thriving Waukesha, whose mission is to help the nonprofit community become more efficient and effective at meeting the community’s needs. The first two issues Thriving Waukesha is addressing are homelessness/affordable housing and transportation.

## CR-58 – Section 3

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

<b>Total Labor Hours</b>	<b>CDBG</b>	<b>HOME</b>	<b>ESG</b>	<b>HOPWA</b>	<b>HTF</b>
Total Number of Activities	0	1	0	0	0
Total Labor Hours	0	0			
Total Section 3 Worker Hours	0	0			
Total Targeted Section 3 Worker Hours	0	0			

**Table 14 – Total Labor Hours**

<b>Qualitative Efforts - Number of Activities by Program</b>	<b>CDBG</b>	<b>HOME</b>	<b>ESG</b>	<b>HOPWA</b>	<b>HTF</b>
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.		5			
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.		12			
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 15 – Qualitative Efforts - Number of Activities by Program**

**Narrative**

In 2024, as a continuing project, Waukesha County HOME Consortium provided funding for one (1) Section 3 project. The Subrecipient, Habitat for Humanity, is constructing 16 single-family homes and two duplexes on a vacant lot of 3.58 acres within the City of Waukesha. All the homes will be for LMI households. Homes will be a combination of 3 or 4 bedrooms and 1.5 or 2 baths based on the needs of the families. Each home will have a backyard, front porch, garage, driveway, and sidewalk accessibility. This is a unique situation as this property is the only vacant city block available to be developed within the City of Waukesha. These housing units are in a walkable area close to schools, retail services, employment centers, adjacent to a bike trail, has the benefit of being on 10+ Bus stops within two blocks, many of the largest employers in Waukesha are only 10-15 minutes away from this property. The project started in January of 2023 with a scheduled project construction completion in June 2026. In 2024, the project labor hours totaled 5,754.89 with 2,570.17 of those hours worked by Section 3 workers. During the entirety of the project to date labor hours totaled 14,196 with 4,275.68 of those hours worked by Section 3 workers. In addition, in 2024, undertaken Good Faith Efforts included five (5) unique attempts of Outreach efforts to identify and secure bids from Section 3 business concerns, and twelve (12) unique attempts with Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns. The project is progressing, to date 6 HOME units are constructed and sold. Currently, in 2025, the remaining 5 HOME units are under construction.