

In The Matter Of:
*2022-2023 Consolidated Annual
Performance Evaluation*

June 6, 2023

*Lesofski Court Reporting & Video Conferencing
7 West Sixth Avenue, Suite 2C
Helena, MT 59601
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Min-U-Script®

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IN THE MATTER OF:
Montana Department of Commerce
2022-2023 Consolidated Annual Performance &
Evaluation

Transcript of Public Hearing via Zoom
June 6, 2023

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2022-2023 CONSOLIDATED ANNUAL PERFORMANCE AND
EVALUATION REPORT

MONTANA DEPARTMENT OF COMMERCE

TRANSCRIPT OF PUBLIC HEARING

June 6, 2023

2:00 p.m.

Via Zoom

MARLA JESKE

LESOFSKI COURT REPORTING

7 WEST SIXTH AVENUE, SUITE 2C

HELENA, MONTANA 59601

(406) 443-2010

PARTICIPANTS

VIA ZOOM:

- RACHEL "RACH" SINGER
- NICOLE NEWMAN
- CHANDLER ROWLING
- NATALIE LISKO
- JULIE FLYNN
- ROSIE GOLDICH
- JENNIFER STEPLETON
- SHYLA PATERA
- TRACY MENUENZ
- ANDREW CHANANIA

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1 The following proceedings were had and
2 testimony taken:

3
4 * * * * *

5
6 MS. GOLDICH: Welcome to the public hearing
7 for the 2022-2023 Consolidated Annual
8 Performance -- recording in progress -- and
9 Evaluation Report sponsored by the Montana
10 Departments of Commerce and Health and Human
11 Services.

12 My name is Rosie Goldich, and I'm a
13 community development block grant coordinator at
14 Community MT, a division of the Montana Department
15 of Commerce.

16 Just a few housekeeping notes. This
17 public hearing is being recorded. A transcript
18 will be available on Commerce's website or by
19 request. Please use the Q and A feature for any
20 technical issues or questions. Please save your
21 comments on the 2022-2023 CAPER and 2023-2024 AAP
22 until the end of the presentation.

23 The State of Montana through the
24 Department of Commerce and Department of Public
25 Health and Human Services developed a five-year

1 plan to guide policy and investment for housing,
2 infrastructure, economic, and other community
3 development needs. The five-year plan, also known
4 as the Consolidated Plan For Housing and Community
5 Development, is required by the U.S. Department of
6 Housing and Urban Development to assess Montana's
7 needs and current conditions as well as to
8 determine priorities and allocate HUD Community
9 Planning and Development funding.

10 The perspectives and opinions shared by
11 participants of this public hearing will help
12 Commerce and DPHHS to edit and finalize the draft
13 2022-2023 CAPER, which falls under the 2020-2024
14 consolidated plan. We hope that with your input,
15 we can ensure community development needs across
16 Montana are identified and addressed.

17 The objection -- the objectives of
18 Montana's consolidated plan include to provide
19 decent housing, provide us a suitable living
20 environment, and expand economic opportunities.

21 The goals of Montana's consolidated plan
22 are: Goal 1, preserve and construct affordable
23 housing; 2, plan for communities; 3, improve and
24 sustain public infrastructure; 4, revitalize local
25 economies; and 5, reduce homelessness.

1 The programs included in the
2 consolidated plan are as follows: Community
3 Development Block Grant, or CDBG, includes housing,
4 including rental development and single-family
5 rehabilitation, public and community facilities,
6 economic development, and planning; HOME Investment
7 Partnerships Program, including rental development,
8 single-family development, rental rehabilitation,
9 and homebuyer assistance; Housing Trust Fund, or
10 HTF, which includes rental development and rental
11 rehabilitation; Emergency Solutions Grant, or ESG,
12 which includes emergency shelter, homelessness
13 prevention, and rapid rehousing; and Housing
14 Opportunities for Persons with AIDS, also known as
15 HOPWA. For more information on Montana's
16 competitive HOPWA grant, please contact Julianna
17 Campbell at Julianna.Campbell@mt.gov.

18 There are three main documents that are
19 part of the consolidated plan. The first is the
20 five-year Consolidated Plan For Housing and
21 Community Development, also known as the con plan.
22 Consolidated plans are strategic plans that guide
23 housing and community development -- and community
24 investments, excuse me. Montana is currently
25 operating under the 2020 to 2024 consolidated plan.

1 The second document is the annual action
2 plan, or the AAP. AAPs are prepared each year of
3 the consolidated plan and outline specific
4 activities, goals, and objectives for the given
5 program year.

6 The last is the Consolidated Annual
7 Performance and Evaluation Report, also known as
8 the CAPER. CAPERs are annual reports that detail
9 use of funds and progress towards meeting goals and
10 objectives for AAPs. Montana's 2022 to 2023 CAPER
11 reports on activities for Program Year 3 of the
12 2020 to 2024 consolidated plan, which runs from
13 April 1st, 2022 to March 31st, 2023.

14 These are the allocations and awards
15 made during Program Year 3, which is April 1st,
16 2022 through March 31st, 2023. The top chart
17 depicts the allocations that were made. In Plan
18 Year 3, CDBG allocated \$1 million towards the goal
19 to preserve and construct affordable housing,
20 \$500,000 towards the goal to plan for communities,
21 \$2,241,085 towards the goal to improve and sustain
22 vital public infrastructure, \$1,750,000 towards the
23 goal to revitalize local economies, and \$750,000
24 towards the goal to -- goal to reduce homelessness,
25 and \$296,116 towards administrative costs. In Plan

1 Year 3, HOME allocated \$2,328,430 towards
2 preserving and constructing affordable housing,
3 \$750,000 towards reducing homelessness, \$342,000
4 and 47 -- \$342,047 towards administrative costs.
5 In Plan Year 3, ESG allocated \$686,264 towards
6 reducing homelessness and \$55,642 towards
7 administrative costs. In Plan Year 3, HTF
8 allocated \$1,934,190 towards preserving and
9 constructing affordable housing, \$750,000 towards
10 reducing homelessness, and \$298,243 towards
11 administrative costs.

12 Under awards in Plan Year 3, CDBG
13 awarded \$1,566,117 towards preserving and
14 constructing affordable housing, \$641,857 -- \$75
15 towards planning for communities, \$7,947,050
16 towards improving and sustaining vital public
17 infrastructure, and \$400,000 towards revitalizing
18 local economies. In Plan 3 Year, HOME awarded
19 \$1,400,000 to preserving and constructing
20 affordable housing, \$1,278,200 -- and \$32 towards
21 reducing homelessness. In Plan Year 3, ESG awarded
22 \$687,765 towards reducing homelessness. In Plan
23 Year 3, HTF awarded \$650,000 towards preserving and
24 constructing affordable housing.

25 You'll notice that because not all of

1 the HTF or CDBG housing funds were awarded, there
2 is an additional HTF and CDBG housing run closing
3 tomorrow, June 7th. The 2023 funds for HOME, HTF,
4 and CDBG housing may be applied for by September
5 15th, 2023. Funds from previous years that had not
6 been expended would carry over to this program
7 year, resulting in the awards for CDBG housing,
8 planning, and public infrastructure being higher
9 than the allocation.

10 These are the projects that were awarded
11 during Plan Year 3. There were 35 CDBG projects
12 awarded totaling \$10,555,042. There were three
13 housing projects totaling \$1,566,117. There were
14 eight public facilities projects awarded totaling
15 \$5,550,000. There were four community facility
16 projects awarded \$2,397,050. There was one
17 economic development project awarded for \$400,000.
18 There were 19 planning projects awarded totaling
19 \$641,875. There were five HOME projects awarded
20 totaling \$3,146,032. These projects included one
21 homebuyer assistance, three rental rehabilitation,
22 one of which addresses homelessness, and one rental
23 of new construction. There were -- there was one
24 HTF project awarded for \$650,000, which was a
25 rental rehabilitation project. For ESG, \$741,906

1 was awarded to nine of the ten HRDCs via formula
2 grants.

3 CDBG, CDBG-CV, HOME, HTF, and ESG
4 expended a total of \$11,526,805 in Program Year 3.
5 CDBG and CDBG-CV expended \$5,243,611. HOME
6 expended \$3,992,677. HTF expended \$1,369,049. And
7 ESG expended \$871,844.

8 For CDBG, under preserve and construct
9 affordable housing, CDBG expended \$110,783. Under
10 plan for communities, CDBG expended \$508,075.
11 Under improve and sustain vital public
12 infrastructure, CDBG expended \$3,199,704. And
13 under admin costs, CDBG expended \$320,298. CDBG-CV
14 expended \$340,969 for preserve -- to preserve and
15 construct affordable housing. CDBG-CV expended
16 nine hun- -- \$99,733 to improve and sustain vital
17 public infrastructure. CDBG-CV expended \$580,000
18 to reduce homelessness. And there were \$84,049 for
19 CDBG-CV admin costs.

20 Under HOME, \$3,891,580 were expended to
21 preserve and construct affordable housing, and
22 there were \$101,097 in admin costs. HOME-ARP
23 expended \$49,624 under admin costs. ESG expended
24 \$778,519 to reduce homelessness and \$93,325 for
25 administrative costs. HTF expended \$1,091,956 to

1 preserve and construct affordable housing. HTF
2 also expended \$16,500 to reduce homelessness, and
3 there were \$260,000 -- \$260,593 for admin costs.

4 This slide depicts the 2022 to 2023
5 CAPER goals and outcomes. Under preserve and
6 construct affordable housing, the goal indicators
7 were to -- were rental units constructed, rental
8 units rehabilitated, homeowner housing added,
9 homeowner housing rehabilitated, and direct
10 financial assistance to homebuyers. The -- of the
11 four columns, the column depicting all program
12 years to date, the expect -- expected strategic
13 plan and actual strategic plan refers to the goals
14 set in the 2020 to 2024 consolidated plan, and then
15 the current program year columns are for the
16 2022-2023 CAPER.

17 The expect -- for the expected outcome
18 for the -- for this program year, 12 household
19 units rentals were constructed, and none were
20 actual -- actually constructed. For rental
21 unit -- rental units rehabilitated, the goal was
22 83, and the actual outcome was 63. For homeowner
23 housing added, the expected goal was two. There
24 were none added. Homeowner housing added, the
25 expected outcome was two -- or I'm sorry. It was

1 two, and then the actual was zero. Homeowner
2 housing rehabilitated, the expected outcome was
3 three, and the actual was three. For direct
4 financial assistance to homebuyers, the expected
5 outcome was 10, and the actual was six.

6 For plans for communities, the goal was
7 15 local governments assisted, and the actual was
8 18. For improve and sustain public infrastructure,
9 the goal was 1,000 persons assisted. The indicator
10 was public facility or infrastructure activities
11 other than low/moderate income housing benefit.
12 And the actual was 10,165. For the public facility
13 or infrastructure activities for low/moderate
14 benefit -- low/moderate income housing benefit, the
15 goal was 20 households assisted. The actual was
16 zero. Under revitalize local economies, the goal
17 was one business assisted through facade treatment
18 or business building rehabilitation. The actual
19 was zero. The goal was 50 jobs -- jobs created or
20 retained. That actual was zero. The goal -- the
21 expected goal was three businesses assisted, and
22 the actual was zero.

23 Under reducing homelessness, the goal
24 was 350 households assisted under tenant-based
25 rental assistance/rapid rehousing. The actual was

1 84. The goal -- the expected goal was 170 persons
2 assisted through homeless person overnight shelter.
3 That actual was 2,000. The next goal -- the next
4 expected goal was 480 persons assisted through
5 homelessness prevention. The actual was 148. And
6 the last goal -- the last expected goal was 20
7 person -- 20 household housing units housing for
8 homelessness added. The goal was 20, and the
9 actual was zero.

10 These are a list of monitoring visits
11 that were conducted during the 2022-2023 CAPER
12 year. There were, under the four program areas,
13 six CDBG projects, one CDBG-CV project, four HOME
14 projects, and three HTF projects were all monitored
15 for project completion. Four HOME and one HTF
16 project were monitored for construction progress.
17 Fifty-four HOME projects and three HTF projects
18 were monitored during the period of affordability.
19 And all nine ESG sub-recipients were monitored with
20 virtual visits and desk monitoring.

21 The 2022-2023 CAPER is available online
22 on Commerce's website, as you can see here;
23 available at several depositories throughout the
24 state. Please see our website for the full list;
25 and also by request.

1 During this public hearing, we are also
2 accepting general comments and initial input on the
3 2023-2024 AAP. Commerce and DPHHS are developing
4 the 2023-2024 annual action plan that covers April
5 1, 2023 through March 31, 2024.

6 The CP -- HUD CPD allocations for
7 Plan Year 4 include \$6,541,090 for CDBG,
8 \$3,450,000 -- \$450,234 for HOME, \$3,066,413 for
9 HTF, and \$741,200 for ESG. Initial input on the
10 way Commerce and DPHHS should utilize these funds
11 to meet community development needs across Montana
12 is encouraged during the public comment period.
13 The draft 2023 to 2024 AAP will be released on June
14 29th, 2023, and there will be a public hearing on
15 July 25th, 2023, for further input.

16 This is the 2022 to 2023 CAPER contact
17 information. You can mail your comments to Montana
18 Department of Commerce at 301 South Park Ave in
19 Helena, Montana. The ZIP Code is 59601. Our P.O.
20 Box is 200523 in Helena, Montana 596 -- 59620-0523.
21 The division administrator is Galen Steffens. The
22 CDBG coordinator is myself, Rosie Goldich. The
23 phone number is (406) 841-2770. The fax number is
24 (406) 841-2771. We are also accepting comments by
25 e-mail at doconplan@mt.gov. And you can find them

1 also on our website, which is
2 commerce.mt.gov/consolidated-plan.

3 For DPHHS, their address is 1400 Carter
4 Drive in Helena, Montana, 59601. Their P.O. Box is
5 202956 in Helena, Montana. ZIP Code is 59620-2956.
6 Their administrator is Gene Hermanson. The bureau
7 chief is Sarah Loewen. You can reach them by phone
8 at (406) 447-4265. The fax is (406) 447-4287. And
9 their website is www.dphhs.mt.gov.

10 Comments regarding the draft 2022-2023
11 CAPER are now being accepted. If you have a
12 comment and are joining via webinar, please raise
13 your hand so we can unmute you. If you're joining
14 via phone, please press star-9 to indicate if you
15 have a comment and then press star-6 to unmute or
16 remute yourself. When providing comment, please
17 state and spell your name. Please state the
18 organization you represent if applicable. Written
19 comments should be addressed to the address or
20 e-mail below and will be accepted until 5:00 p.m.
21 on June 22, 2023. You can also submit your
22 comments via mail at the Montana Department of
23 Commerce Community Development Division, Attention:
24 Con plan, to P.O. Box 200523 in Helena, Montana,
25 59620-0523 or e-mail them to docconplan@mt.gov.

1 Okay. So I will see if anyone has their
2 hand raised. Okay. So Shyla Patera, I am now
3 giving you permission to talk.

4 MS. PATERA: Good afternoon. For the record,
5 my name is Shyla Patera; spelled S-H-Y-L-A,
6 P-A-T-E-R-A, and I'm employed by and represent
7 North Central Independent Living Services in Black
8 Eagle, Montana.

9 NCILS is a center for independent living
10 that helps Montanans with disabilities navigate
11 services so that many can live in communities with
12 or without housing supports.

13 And my comment on the CAPER is I'd like
14 to congratulate both Montana Housing community
15 development division and DPHHS for doing
16 sustainable work throughout this con plan to ensure
17 that many with disabilities can stay in their
18 homes. However, now that the COVID emergency is
19 over and finished, we advocate that you work with
20 your builders and building community to ensure that
21 all housing and apartments have universal design
22 and visibility features in them as well as
23 accessible transportation and community access ways
24 in our infrastructure community, including
25 sidewalks and other things.

1 As a long time housing advocate, I can
2 appreciate the work that the HOME and ESG
3 programs have done to keep many of our
4 disability -- citizens with disabilities housed.
5 However, I do and NCILS does also believe that we
6 do need to continue building community supports
7 throughout our programs so that, particularly if
8 people are homeless, they can have maximized
9 accessibility supports not only in the
10 accessibility realm, but the policy and programatic
11 realm too, as well.

12 And I will send written comments
13 regarding all of this so that I do not take a
14 complete hour of your time. Thank you so much for
15 allowing me to submit comments.

16 MS. GOLDICH: Thank you so much, Shyla, for
17 submitting your comment.

18 Does anyone else have any other comments
19 that they would like to share at this time? Okay.
20 Hearing none, this is a friendly reminder that you
21 can submit your written comments either by mail or
22 through e-mail through June 22nd at 5:00 p.m. You
23 can e-mail them to docconplan@mt.gov or send a
24 physical letter to the Community Development
25 Division of Montana Department of Commerce,

1 Attention: Con plan, at P.O. Box 200523 to Helena,
2 Montana, 59620-0523.

3 So thank you all for joining today.
4 Recording stopped.

5
6 (Hearing concluded at 2:32 p.m.)

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