

City of West Allis CDBG Program  
Citizen Participation Plan Internal Transfer of Funds Request Form

<b>Requester's Name &amp; Title:</b> Steve Schaer, City Planning Director			
<b>Activity Name:</b> Liberty Heights Park Pavilion Improvement			
<b>Activity Program Year:</b> 2023			
<b>IDIS Project Number:</b> C23409 (pavilion)			
<b>Transfer from Funds Year(s):</b>	2020, 2021, 2022	<b>Request Date:</b>	April 2, 2026

**Purpose/Summary:**

**Pavilion Project –**

*Substantial amendment to the FY2020-FY2025 Community Development Block Grant Action Plan, to reallocate unprogrammed Block Grant funding of \$85,624 to complete the Liberty Heights Park Pavilion project activity.*

The new pavilion needs a total of \$108,706 for the final payment. There is a current balance of \$23,082.12 available within the Liberty Heights Park Pavilion Project activity (C23409). A total of \$85,624 is needed to fill the gap.

	<b>Amt Available to Commit to Activities</b>	<b>Move to Pavilion</b>	<b>Updated Unprogrammed Funds Balance</b>
2020	\$ 8,117.14	\$ 8,117.14	\$ -
2021	\$ 22,983.78	\$ 22,983.78	\$ -
2022	\$ 210,314.71	\$ 54,523.08	\$ -
2023	\$ 294,168.78	\$ -	\$ 290,437.86
2024	\$ 51,670.36	\$ -	\$ 51,670.36
2025	\$ 84,856.20	\$ -	\$ 84,856.20
	<b>\$ 672,110.97</b>	<b>\$ 85,624.00</b>	<b>\$ 426,964.42</b>

The request above will go before the Common Council (April 14, 2026) via resolutions for consideration as it requires a substantial amendment per our Citizen Participation plan. If approved by Common Council, it would include the reallocation of unprogrammed CDBG funds from prior years project activities to cover the gap identified.

**Introduction: SUBSTANTIAL AMENDMENTS TO A PLAN**

- Amendments to an approved 5-Year Consolidated Plan or Annual Action Plan (AAP) shall be made consistent with the regulations at **[24 CFR 91.505]**.
- Amendments to a 5-year Consolidated or AAP shall be made only after a public hearing is held and a public comment period of 30 days takes place.
- Amendments will take place whenever a substantial change is made in allocation priorities, a distribution of funds, or in activities funded by an Action Plan.
- For the purposes of amending a Plan, "**Substantial Change**" is defined:
  - *By goal: the addition or deletion of a goal to a previously adopted Plan;*
  - *By project: the addition or deletion of a project to a previously adopted Plan;*
  - *By activity: the addition or deletion of an activity to a previously adopted Plan;*
  - *By dollar amounts: a 10% change in annual allocation award when comparing the anticipated annual allocation that had been published in the AAP notification/public hearing vs. the actual annual allocation awarded from HUD;*

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**Instructions:**

- By dollar amounts: an increase in funding to an activity of \$100,000 or 100% of the amount originally approved, whichever is greater; or a decrease in funding to an activity of \$100,000 or 100% of the amount originally funded, whichever is greater, but only when the scope of an activity reached less than 75% of its quantifiable outcomes. Department of Development staff may direct the Finance Department to make a non-substantiative change to an activity through a funding change of less than \$100,000 or less than 100% of the amount originally approved, through written directive/communication without the requirement of a public hearing and public comment period. Dollar amounts may increase due to Program Income received and/or a different activity being complete and its unused funds being transferred to an existing activity.
- By scope: any change that reduces by 75% the expected outcome of the services provided by the funding of a particular activity.
- By location: any change in a site-specific location.
- By beneficiaries: any change that reduces by 75% the number of very low or low-income persons expected to benefit from an activity.

**TRANSFER OF FUNDS GENERAL QUESTIONS**

1.

Is the amount of the internal transfer of funds request under the amount of \$100,000 according to the City of West Allis Citizen Participation Plan and qualifies as non-substantiative?	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b>
<b>a. What is the “exact” dollar amount of internal transfer of funds requested?</b> Pavilion \$85,624	
<b>b. Provide the “exact” dollar amount and Resolution number of the original activity funding according to the Annual Action Plan approved by the City’s Common Council:</b> \$1,279,630– <b>R-2024-0447</b>	

2.

Is there a timeline of this activity’s completion to meet annual timeliness guidelines of the CDBG Program according to [24 CRF 570.902]?	<input checked="" type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/> <b>N/A</b>
<b>Provide a summary of the anticipated timeline of the activity’s completion:</b> The City of West Allis anticipates the completion of the Liberty Heights Park Pavilion in Spring of FY 2026.	

<b>Requestor Signature</b>	Date:
<b>Director of Planning &amp; Zoning</b>	Date:
<b>Deputy Finance Director</b>	Date: