



# City of Greensboro

Date: June 23, 2008  
To: Andy Scott, Director of Housing & Community Development  
From: Internal Audit Division  
Subject: Great Oaks Limited Partnership, for St. Leo's Place at Great Oaks

The Internal Audit Division has performed our yearly monitoring visit of Beacon Management which received a Supportive Services grant for Great Oaks Limited Partnership (Partnership) in the amount of \$9,000 from the City of Greensboro during the 2006 to 2007 grant year.

**The Supportive Services** grant for \$9,000 was used to assist the Partnership development with a budgeted Administrative Expense of \$2,000 and Tenant Services of \$7,000. Only \$6,841.40 of the \$9,000.00 grant was requisitioned by the grantee. There are 44 units in Great Oaks Apartments. This is the 8th year of funding that began with the 2001-2002 grant year.

We examined selected financial transactions and program documentation maintained by the Partnership for compliance with the contract and for assurance that program goals were achieved. Based on our review, it appears that the funds have been spent according to the terms of this contract.

We would like to thank Ms. Donna White, Property Manager; Ms. Cathy Mitchell, Regional Manager and the staff of the Beacon Management for their courtesy and cooperation shown to us during this visit. If there are any questions or comments concerning the details of this visit, we can be reached at 373-2821.

Mickey Kerans  
Internal Auditor

Len Lucas  
Internal Audit Director

Cc: Bob Morgan, Deputy City Manager  
George Carr III, President of Beacon Management

June 23, 2008

Andy Scott, Director of Housing & Community Development

Internal Audit Division

Great Oaks Limited Partnership, for St. Leo's Place at Great Oaks

The Internal Audit Division has performed our yearly monitoring visit of Beacon Management which received a Supportive Services grant for Great Oaks Limited Partnership (Partnership) in the amount of \$9,000 from the City of Greensboro during the 2006 to 2007 grant year.

**The Supportive Services** grant for \$9,000 was used to assist the Partnership development with a budgeted Administrative Expense of \$2,000 and Tenant Services of \$7,000. Only \$6,841.40 of the \$9,000.00 grant was requisitioned by the grantee. There are 44 units in Great Oaks Apartments. This is the 8th year of funding that began with the 2001-2002 grant year.

We examined selected financial transactions and program documentation maintained by the Partnership for compliance with the contract and for assurance that program goals were achieved. Based on our review, it appears that the funds have been spent according to the terms of this contract except for the following findings: ?

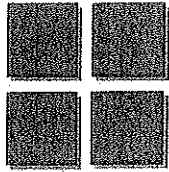
We would like to thank Ms. Donna White, Property Manager; Ms. Cathy Mitchell, Regional Manager and the staff of the Beacon Management for their courtesy and cooperation shown to us during this visit. If there are any questions or comments concerning the details of this visit, we can be reached at 373-2821.

Mickey Kerans  
Internal Auditor

Len Lucas  
Internal Audit Director

Cc: Bob Morgan, Deputy City Manager  
George Carr III, President of Beacon Management





# HCD

Department of Housing & Community Development

**Date:** June 21, 2008  
**To:** George Carr, Beacon Management, Inc  
**From:** Michael Blair, City of Greensboro HCD  
**RE:** FY06/07 (2008) Supportive Services St. Leo's Place/Great Oaks

### **Project Information:**

For reference purposes the 44 unit St. Leo's at Great Oaks Apartment Elderly (55 and up) housing development is located at 800 Sullivan Street, Greensboro, NC. The complex is managed by Beacon Management, George Carr, President.

The property received a \$9,000 Supportive Services grant in FY06/07 which is the subject of this review. Supportive Services records were reviewed on-site at the apartment property.

### **Spending:**

The grant was funded for \$9,000 but a lesser amount, \$6,841.40, was actually expended.

### **Programmatic Review:**

Supportive services and activities for the residents of St. Leo's Place are well attended by an active older population. A review of sign-in sheets for FY06/07 showed that usually 10 to 25 residents attended each social (food and presentations etcetera) but attendance was low for exercise programs so they were cancelled. Events were scheduled throughout the year (8-9/m the first two months of the FY then reduced to 2/m for the rest of the year) and participation appeared to HCD staff to have remained stable for the remaining events.

HCD appreciates the services provided to St. Leo's Place residents during FY06/07. All FY06/07 payments made were for eligible expenses per the agreement.

The draft April 28, 2008 Internal Audit report included one finding regarding unspent funds. It should be noted that the City terminated rental housing Supportive Services after FY06/07. St. Leo's Place did not receive FY07/08 city supportive services funding and it should be noted that future supportive services funding is not planned.

  
\_\_\_\_\_  
Michael Blair  
Specialist Grants Compliance

  
\_\_\_\_\_  
Andy Scott  
Director HCD