

CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT

FOR THE
CITY OF NEWTON
HOUSING AND COMMUNITY DEVELOPMENT PROGRAM
AND THE
WESTMETRO HOME CONSORTIUM

JULY 1, 2021 – JUNE 30, 2022

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Executive Summary

The FY23 (FFY22) Consolidated Annual Performance and Evaluation Report (CAPER) provides an analysis of the third year of the FY21-FY25 (FFY20-FFY24) Consolidated Plan—July 1, 2022 through June 30, 2023—for the City of Newton Community Development Block Grant program (CDBG), Emergency Solutions Grant (ESG) program, and the WestMetro HOME Consortium HOME Investment Partnerships program (HOME). These programs provided the City of Newton and 12 other communities in the WestMetro HOME Consortium with a total of **\$3,972,770.51 in FY23 (FFY22) resources** from The U.S. Department of Housing and Urban Development (HUD).

The CAPER is an assessment of how successful Newton and the Consortium communities were at meeting their goals as identified in the FY23 (FFY22) Annual Action Plan and the FY21-25 Consolidated Plan. In June of 2022 the City submitted the FY23 (FFY22) Annual Action Plan to HUD, which provided details to citizens, public and private agencies, and other interested parties on the program activities that were planned in response to the priority needs identified in the FY21-25 Consolidated Plan. The FY21-25 Consolidated Plan was developed to describe the use of CDBG, HOME, and ESG program funds for housing and community development activities in Newton and housing activities in the 12 other HOME Consortium communities (the towns of Bedford, Belmont, Brookline, Concord, Lexington, Natick, Needham, Sudbury, Watertown, Wayland, and the cities of Framingham and Waltham).

CDBG, ESG and HOME funds

The following table summarizes the amount of FY23 (FFY22) funds that were received, and the amount of funds expended in FY23, including funds from prior years:

| Source of Funds | Funds Received | Funds Expended |
|---------------------------|-----------------------|-----------------------|
| CDBG | \$2,157,272.91* | \$1,866,096.83 |
| HOME Consortium | \$1,650,438.60** | \$1,544,505.63 |
| Emergency Solutions Grant | \$165,059.00 | \$161,407.13 |
| Total | \$3,972,770.51 | \$3,572,009.59 |

*Includes \$286,877.91 in CDBG program income received during FY23 (FFY22)

**Includes \$32,100.60 in HOME program income received during FY23 (FFY22)

The following table is a snapshot of FY23 (FFY22) HOME funds received by Newton from the total WestMetro HOME Consortium funds listed above, and the amount of HOME funds the City expended in FY23, including funds from prior years:

| Program | Funds Received | Funds Expended |
|--------------------|----------------|----------------|
| Newton HOME Funds* | \$190,765.40 | \$266,450.60 |

In FY23 (FFY22), the City of Newton received \$2,157,272.91 in CDBG funds and expended \$1,866,096.83 in FY23 (FFY22) and prior year funds. The WestMetro HOME Consortium, which includes 13 communities, received \$1,650,438.60 in HOME funds and expended \$1,544,505.63 in FY23 (FFY22) and prior year funds. From the WestMetro HOME Consortium funds, the City received \$190,765.40 in HOME funds and expended \$266,450.60 in FY23 (FFY22) and prior year funds. A total of \$165,059.00 in ESG funds was received by the City in FY23 and \$161,407.13 was expended in FY23 (FFY22) and prior year funds.

The Newton Housing and Community Development Division of the Planning Department (the Division) utilized these funds to meet the goals of the FY21-25 (FFY20-FFY24) Consolidated Plan and the FY23 (FFY22) Annual Action Plan. These goals include:

- Production of new affordable units
- Support of affordable homeownership
- Rehabilitation of existing units
- Preservation of affordable units
- Provision of supportive services to the homeless and at-risk of homeless
- Increase awareness of fair housing policies and practices
- Provision of human services
- Implementation of architectural accessibility improvements for persons with disabilities

Goal: Production of affordable housing and

Goal: Rehabilitation of housing

In FY23 (FFY22), CDBG and HOME funding allocated to the City of Newton continued to be used for a variety of programs and activities to preserve and expand affordable housing opportunities across the City. In alignment with the FY21-FY25 Consolidated Plan, the Division sought to fund affordable housing projects near amenities, village centers, and public transportation options to promote housing equality and economic and demographic diversity. The Division also looked to support projects that provide Newton seniors the opportunity to remain in the community as they age, as well as providing opportunities for affordable housing

for families. Additionally, the Division aimed to identify projects that would expand the stock of accessible and visitable housing.

There are currently two projects nearing construction completion that have received prior years' CDBG and HOME funds. The first is the Newton Housing Authority's (NHA) Haywood House project. This project, which was awarded FY20 and FY21 Newton CDBG funds, provides 55 new affordable rental units for seniors with incomes ranging from 30% AMI to 99% AMI. Three of the units are fully accessible and four units are designated for households that have been homeless or are at risk of homelessness. Haywood House also includes two elevators and community space for supportive services. Initial occupancy of the units occurred in May 2023 and full project completion is anticipated in the Fall of 2023.

The second project is the expansion of the Golda Meir House that is owned, developed, and managed by 2Life Communities. In FY21, the project was awarded FY18, FY20, and FY21 HOME funds to support the new construction of 57 one-bedroom apartments and 11 two-bedroom apartments. Of the 68 new units, 20 units are set aside for households earning 30% of the AMI and 25 units are set aside for households earning 50% of the AMI. All 45 of these units have project-based vouchers. The Section 8 vouchers associated with the 30% AMI units support nine non-age restricted chronically homeless individuals with disabilities. To successfully provide permanent supportive housing, 2Life Communities partnered with Hearth, Inc., a nonprofit organization dedicated to the elimination of homelessness among the elderly through prevention, placement, and housing programs. Initial occupancy of the units occurred in April of 2023 and project completion is expected in the Fall of 2023.

In FY23, Newton continued to push forward the redevelopment of the West Newton Armory site on Washington Street into 100% affordable housing. After the City took ownership of the Armory in the Fall of 2021, Metro West Collaborative Development/Civico Development was selected as a development partner. The Metro West/Civico proposal includes 43 units of intergenerational housing affordable to households earning 30 to 60 percent of the AMI. During FY23, the Planning and Development Board approved a pre-commitment of FY24 and FY25 CDBG funds (total of \$930,000) and FY24 HOME funds (\$132,023.50), alongside the City's Inclusionary Zoning and Community Preservation Act funds, to develop the Armory into affordable housing with supportive services. The Armory project received its Chapter 40B Comprehensive Permit from the Newton Zoning Board of Appeals and submitted a One Stop Application to the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) for LIHTC financing in January 2023. In May of 2023, the West Newton Armory was one of 27

projects awarded state and federal tax credits, subsidy funds, and ARPA funds by the Healey-Driscoll Administration. The project is expected to be completed in FY26.

Lastly, Newton also maintains its existing affordable housing stock and increases the number of lead safe properties through the CDBG Housing Rehabilitation Program. The Program addresses code violations and eligible repairs. In FY23, the City made progress on commencing the rehabilitation of a portion of the former CAN-DO portfolio (16 rental units for low-income households across 7 properties). The rehabilitation work on five CAN-DO properties was completed in FY23. These properties include: 61 Pearl Street, 11-13 Cambria Road, 10-12 Cambria Road, 14 Nonantum Place, and 20-22 Falmouth Road. Also in FY23, the City began reviewing new applications for the NHA's Pelham Street property and two potential homeowner cases.

Goal: Preservation of Affordable Units

In FY23, the City continued to advance the CAN-DO Acquisition and Preservation project through the second phase: property rehabilitation. In FY20 (FFY19), the Newton Housing Authority received funding approval from the City's Planning & Development Board and Community Preservation Committee to acquire and preserve the CAN-DO affordable housing portfolio of 33 units across 12 scattered sites in Newton. The City awarded the Newton Housing Authority (NHA) a total of \$1,200,000 in combined FY19, FY20, and FY21 CDBG funds. The affordability of the housing was placed in jeopardy when CAN-DO disaffiliated from its management partner, Metro West Collaborative Development, in 2018. In FY21 (FFY20), the Newton Housing Authority officially closed on the acquisition of the portfolio. During the closing process, CAN-DO added an additional property (236 Auburn Street) to the sites to be acquired by the NHA. This increased the acquisition to 36 units across 13 scattered sites, 33 units of which were financed by \$648,648 of CDBG funds. Once the acquisition and debt reduction were complete in FY21, the City began working with the NHA to conduct lead testing and remediation where necessary, prepare project scopes of work, and begin the public procurement process to rehabilitate the properties, prioritizing the units with the greatest infrastructure and safety needs. As previously stated, rehabilitation on five of these former CAN-DO properties was completed in FY23.

In addition to the preservation of the CAN-DO portfolio, the City is actively preserving affordable senior housing at 2Life Communities' Coleman House with FY21 CDBG and FY22 HOME funds. These funds are being used to conduct a comprehensive rehabilitation of the building's mechanical systems and infrastructure, as well as accessibility design upgrades to each of the 146 units. The improvements will make the project more efficient and

environmentally sustainable for the next several decades, as well as improving the quality of life for senior residents. Construction began in the Summer of 2021 and was expected to be completed in September of 2023. Contractors ran into some unanticipated problems with the existing conditions, coupled with new fire and electric code requirements, that have pushed back the project timeline.

Finally, following a substantial amendment, the City approved and committed \$100,000 in FY22 CDBG funds for the rehabilitation of Cascap's Nonantum Village Place (NVP). NVP was built in 2003 with funding through HUD's 202 Supportive Housing for the Elderly program, the City of Newton, Newton Housing Authority, and additional state and private funds. NVP is an architecturally detailed wood-frame building with 34 one-bedroom units and an on-site resident manager unit. Some building amenities include seven fully accessible units, a twelve-car parking lot, a community kitchen, dining room, large sitting room, laundry room, and staff offices. All units were built with universal design features to allow for aging in place. NVP is home to older adult households earning less than 50% of the Area Median Income (AMI), with most residents earning less than 30% AMI. The scope of rehabilitation includes replacement of all three levels of roofing with additional siding and trim, new HVAC systems, as well as painting of the entire building. Project work began in FY22 and will be completed in FY24.

Goal: Support Affordable Homeownership

Newton's CDBG-funded Downpayment/Closing Cost Assistance program supports and expands sustainable homeownership among low- and moderate-income households in Newton. The program targets first-time homebuyers of new and existing deed restricted homeownership units. Two income-eligible homebuyers were assisted through the CDBG Downpayment/Closing Cost Assistance program in FY23.

Goal: Provision of supportive services to the homeless and at-risk of homeless

In FY23 (FFY22), five subrecipients were awarded Emergency Solutions Grant (ESG) funds to provide homelessness prevention, rapid rehousing, and shelter services to individuals and families that were experiencing homelessness or at-risk of homelessness. These subrecipients include The Second Step, Middlesex Human Service Agency, Inc., Brookline Community Mental Health Center, Community Day Center of Waltham, and REACH Beyond Domestic Violence. During the FY23 program year, these subrecipients collectively assisted approximately 338 individuals.

Goal: Increase awareness of fair housing policies and practices

Newton and the WestMetro HOME Consortium's most recent (FY21-FY25) iteration of the [Analysis of Impediments to Fair Housing Choice \(AI\)](#) was submitted to HUD in FY21. The AI is an assessment of state and local government's bylaws, ordinances, statutes, and administrative policies and local conditions that affect the location, availability, and accessibility of housing. In FY23, Newton continued to work with the Consortium to pursue the AI's recommendations and strategies to provide greater housing access to all constituencies.

In particular, the Consortium contracted with the Housing Discrimination Testing Program (HDTP) at Suffolk University Law School to conduct a two-year Fair Housing testing study throughout the 13 HOME communities. Approximately ten tests will be conducted in each of the communities over two years to assess the level of race (black) and voucher-based discrimination in the rental housing market. Currently eight of the roughly 130 tests have been completed and thus far the results indicate no discrimination. One test hinted at discrimination and further testing will be conducted before deciding if it is appropriate to send to an enforcing agency.

The parking cost associated with development was also identified as a potential barrier to affordable housing in the Consortium's AI report. To determine the existence of this barrier, the Consortium partnered with MAPC to complete a parking utilization study of over 40 large multi-family, mixed-income and affordable developments built since 2000. MAPC drew upon an analysis of property surveys and overnight parking counts to determine parking demand per unit. The WestMetro Parking Utilization Study Perfect Fit Parking Initiative Phase 4 memorandum, presented to the Consortium in July 2023, cited an oversupply of parking at the research sites. MAPC's policy recommendations include shifting parking minimums to maximums, reducing parking ratios, unbundling parking from housing costs, and exploring strategies for shared parking. These findings were discussed at the Fair Housing Committee meetings.

In January of 2023, the Newton Fair Housing Committee (FHC) also consulted with the Suffolk School of Law Housing Discrimination Testing Program to educate the public about fair housing through a presentation format training. The most recent training, "Fair Housing 101: Training for Real Estate Professionals," examined the history of the real estate industry, government's roles in racial discrimination, and best practices for real estate professionals. Real estate professionals were targeted for this training session, but the FHC also invited local committees and commissions.

Goal: Provision of human services and

Goal: Provision of human services specific to aging in place

In FY23, fourteen subrecipients were awarded Community Development Block Grant (CDBG) funds to support their human service projects. These projects were focused on supporting and enhancing the lives of vulnerable low- and moderate-income individuals across the lifespan. The FY23 Human Services program focused on three key priority areas: Enrichment and Care for Vulnerable Youth, aged 0-18 Years; Stability and Self-Sufficiency for Vulnerable Adults, aged 19-61 Years; and Promoting Economic Security and Vitality for Older Adults, Aged 62+. The FY23 human service projects served individuals and families, youth, elderly, persons with disabilities, and survivors of domestic violence. Services included financial assistance for summer camp, child-care, emergency payments for rent and utilities, residential services, mental health services, and wellness programming. The City's CDBG Human Services Program assisted a total of 1,224 individuals during the FY23 program year. Of the 1,224 individuals served, 37% were seniors aged 62 years and older who received assistance to age in place, 34% were adults aged 19 to 61 years old who received assistance regarding mental health, housing, emergency payments, and 28% were children aged 18 and under who received childcare assistance.

Goal: Implementation of architectural accessibility improvements for persons with disabilities

During FY23, the city completed Phase I of the Marty Sender Trail Installation, an accessible pathway located at the Auburndale Playground. Phase I of this project will close out in FY24. Additionally, the Department of Parks, Recreation, & Culture contracted with CDM Smith Inc. as the design architect for the construction of a fully accessible pathway around the perimeter of McGrath Park on Washington Street. Construction was recently completed on the installation of accessible crossings at Langley Road, Warren Street and Chase Street. This project will also close out in FY24.

WestMetro HOME Consortium Goals

In FY23 (FFY22), the WestMetro HOME Consortium received \$1,650,438.60 in HOME funds and expended \$1,544,505.63 in FY23 (FFY22) and prior year funds. Consortium communities shared three goals in FY23 (FFY22):

1. Tenant based rental assistance,
2. Rehabilitation of existing units, and
3. Production of affordable units

Tenant Based Rental Assistance programs are administered in five of the HOME Consortium communities. The programs in Bedford, Natick, Wayland and Waltham provide security deposit assistance and the first or last month's rent for income eligible households. Waltham and

Framingham also offer full Tenant Based Rental Assistance programs that provide subsidies as vouchers to landlords to supplement the affordable rent paid by income-eligible households. During this program year, 72 Tenant Based Rental Assistance cases were closed out. This total includes 47 families in Waltham and 25 families in Framingham.

Consortium member communities laid the groundwork and continued to make progress on many affordable housing projects that will yield HOME-assisted units in subsequent fiscal years. For example, Belmont, Brookline, Framingham, Waltham, and Watertown each advanced public housing rehabilitation activities during the program year.

CARES Act Funds and Programs

In FY20 (FFY19) the City of Newton received an allocation of funds through the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) **to prevent, prepare for, and respond to COVID-19**. A total of \$1,743,641.00 in CDBG Program Supplemental (CDBG-CV) funds and \$1,483,400.00 in ESG Program Supplemental (ESG-CV) funds were received by the City. The following table details the City’s receipt and expenditure of CARES Act funds.

| Program | Funds Received to Date | Funds Received in FY23 | Funds Expended in FY23 | Funds to Date |
|----------------|-------------------------------|-------------------------------|-------------------------------|-----------------------|
| CDBG-CV | \$1,743,641.00 | \$0 | \$11,297.94 | \$1,743,383.94 |
| ESG-CV | \$1,483,400.00 | \$0 | \$140,764.34 | \$1,483,400.00 |
| TOTAL | \$3,227,041.00 | \$0 | \$152,177.08 | \$3,226,783.94 |

Small Business Recovery Grant Program (SBR)

The Small Business Recovery Grant Program (SBR) was designed to support the stabilization of existing small brick and mortar businesses within the City that experienced significant business disruption due to COVID-19. The City launched two rounds of the program, both funded with \$300,000 in CDBG-CV. Round 1 launched in May 2020 and awards were announced in July 2020, while Round 2 was launched in January 2021 and awards were announced in March 2021. Both rounds of the program sought to assist small businesses in paying for commercial rent or mortgage, wages, loss of inventory, and other demonstrated costs. Grant awards in each round were divided into two groups: microbusiness grants of \$10,000 (businesses with 5 or fewer employees, including the business owner) or small business grants of \$15,000 (businesses with 5 - 20 employees). A total of 54 Newton businesses were supported by the SBR Program. In Round 1, 27 applicants were funded from the 107 applications submitted to the City. There

were 76 applicants in Round 2, from which 27 businesses received grant awards. The final SBR grant activity was closed out at the beginning of FY23.

Additional Newton CDBG-CV programs include the Emergency Housing Relief Program and the Human Service Program. These programs were completed and closed out in FY22.

ESG-CV programs

As authorized by the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), the City received two rounds of Emergency Solutions Grant Program Supplemental (ESG-CV) funds from HUD. In total, \$1,458,150 of ESG-CV funds was made available. Two separate RFPs were issued in April 2020 and August 2020. Priority was given to proposals that addressed the community’s most urgent needs given the impact of COVID-19. Eligible program components included: Emergency Shelter (essential services, shelter operations, renovation), Homelessness Prevention (rental assistance and housing relocation and stabilization services), and Rapid Rehousing (rental assistance and housing relocation and stabilization services). The following table summarizes the five subrecipients that were selected across both rounds of ESG-CV funding. At the end of FY22, five of the eight total ESG-CV projects were completed. The Community Day Center’s Shelter Rehabilitation as well as the Brookline Community Mental Health Center’s Homelessness Prevention and Rapid Rehousing projects are expected to close out by September 2023.

ESG-CV Subrecipients

| Subrecipient and Program | Funding |
|--|-----------|
| Middlesex Human Service Agency for their Waltham Shelter programs affected by the COVID-19 Pandemic project and the City of Waltham’s Temporary COVID-19 Emergency Tent Shelter project. | \$278,755 |
| Community Day Center of Waltham’s Post- Pandemic Re-Structuring Project and the Winter Night Program and Rehabilitation project. | \$481,155 |
| REACH Beyond Domestic Violence’s Safe Housing for Emergency Shelter Guests during the COVID-19 Pandemic project. | \$356,520 |
| Brookline Community Mental Health Center’s Homelessness Prevention COVID-19 Response and Rapid Rehousing COVID-19 Response Programs. | \$284,720 |
| The Second Step’s Homelessness Prevention for Survivors Impacted by COVID-19 project. | \$60,000 |

HOME-ARP

In September of 2021, the WestMetro HOME Consortium was awarded \$5,406,962 through the American Rescue Plan (ARP) Act of 2021. HOME-ARP funds provide individuals or households who are homeless or at risk of homelessness with housing, rental assistance, supportive services, and non-congregate shelter to reduce homelessness and increase housing stability.

The Barrett Planning Group, on behalf of the WestMetro HOME Consortium, prepared the required [HOME-ARP Allocation Plan](#), which outlines the strategy and planned expenditures of federal HOME-ARP funds from the U.S. Department of Housing and Urban Development (HUD). To ensure that the Plan accounted for the most pressing homelessness and housing instability needs, the Consortium conducted broad community outreach to engage stakeholders, advocates, and housing and homelessness service organizations. The Barrett Planning Group held virtual consultations with homelessness providers, housing authorities, fair housing organizations, disability organizations, housing developers, and many more providers and organizations across the Consortium. These consultations were conducted from October through December 2022 to gather data and input on the needs of households experiencing homelessness, at-risk of homelessness, and other vulnerable populations. Additionally, three virtual community meetings were held in December 2022 and a public survey was conducted to garner input from community members who could not attend the virtual meetings. Lastly, the Barrett Planning Group conducted an in-person consultation with the Community Day Center of Waltham to speak to their clients, most of whom are chronically homeless. The resulting analysis was included in the HOME-ARP Allocation Plan and submitted to HUD in March 2023.

As explained in the HOME-ARP Allocation Plan, the Consortium will allocate HOME-ARP funds through the issuance of a Requests for Proposals which is expected to take place in FY24. Eligible HOME-ARP activities include preservation and production of affordable rental housing, Tenant Based Rental Assistance, housing-related supportive services, acquisition and development of non-congregate shelters, non-profit operating assisting or capacity building, and administration and planning. To be eligible, these activities must also benefit populations experiencing homelessness, at-risk of homelessness, fleeing domestic violence, or at high risk of housing instability. The recommended use of HOME-ARP funds was voted on by the Consortium and is described in the table below. HOME-ARP funds must be expended by September 30, 2030.

Use of HOME-ARP Funding

| | Funding Amount | Percent of Grant |
|--|--------------------|------------------|
| Supportive Services | \$750,000 | 14% |
| Acquisition and Development of Non-Congregate Shelters | \$1,000,000 | 18% |
| Tenant Based Rental Assistance (TBRA) | \$300,000 | 6% |
| Development of Affordable Rental Housing | \$2,545,918 | 47% |
| Administration of Planning | \$811,044 | 15% |
| TOTAL HOME ARP Allocation | \$5,406,962 | 100% |

CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)

The City of Newton receives Community Development Block Grant (CDBG), HOME Investment Partnership (HOME) and Emergency Solutions Grant (ESG) funds from the U.S. Department of Housing and Urban Development (HUD). These funds are utilized to address housing and community development needs in the City of Newton and housing needs in the WestMetro HOME Consortium communities. The FY23 (FFY22) Annual Action Plan identified nine goals for the City of Newton. These goals include administration, production of new affordable units, preservation of affordable units, support of affordable homeownership, rehabilitation of affordable housing, provision of supportive services to the homeless and at-risk of homeless, increase awareness of fair housing policies and practices, provision of human services, and implementation of architectural accessibility improvements for persons with disabilities.

The City of Newton also received a supplemental allocation of funds in FY20 (FFY19) and FY21 (FFY20) that was authorized by the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) to prevent, prepare for, and respond to COVID-19. These funds are tied to the FY20 (FFY19) Annual Action Plan and FY16-20 Consolidated Plan through a substantial amendment, but the progress made on CARES Act projects is reported in the narrative of subsequent CAPERs.

The HOME Consortium communities share six goals: administration, tenant based rental assistance, rehabilitation of existing units, production of affordable units, CHDO-set aside, and CHDO operations. The progress that the City and the HOME Consortium has made in advancing these goals is addressed in Table 1- Accomplishments – Program Year and Strategic Plan to Date, and the accompanying narrative.

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)

Please see data and assessment below.

CR-05: Goals and Outcomes for City of Newton & WestMetro HOME Consortium for FY23

| Name of Goal | Category of Goal | Funds Expended in FY22 | Start Fiscal Year | End Fiscal Year | Goal Outcome Indicator (GOI) | GOI Unit of Measure | Outcome Expected FY23 | Actual Outcome FY23 | Percent Complete | Expected Outcome FY21-25 | Actual Outcome FY21-25 | Percent Complete |
|--|---|---|-------------------|-----------------|---|---------------------------|-----------------------|---------------------|------------------|--------------------------|------------------------|------------------|
| NEWTON | | | | | | | | | | | | |
| Administration | Affordable housing; Non-homeless special needs; Non-housing community development | CDBG: \$430,815.78 HOME: \$67,199.60 | 2021 | 2025 | 23- Other (Organization) | 23- Other (Organization) | 1 | 1 | 100% | 1 | 1 | 100% |
| Production of New Affordable Units | Affordable housing | CDBG: \$11,538.12 HOME: \$100,000.00 | 2021 | 2025 | 7-Rental units constructed | 7-Household housing unit | 55 | 0 | 0% | 20 | 8 | 40% |
| | | | | | 9-Homeowner housing added | 9-Household housing unit | 0 | 0 | 0% | 1 | 0 | 0% |
| Support Affordable Homeownership | Affordable housing | CDBG: \$20,000 | 2021 | 2025 | 11-Direct financial assistance to homebuyers | 11-Households assisted | 3 | 2 | 33.33% | 8 | 12 | 150.00% |
| Rehabilitation of Existing Units | Affordable housing | CDBG: \$31,283.76 | 2021 | 2025 | 8-Rental units rehabilitated | 8-Household housing unit | 12 | 0 | 0% | 29 | 0 | 0% |
| | | | | | 10-Homeowner housing rehabilitated | 10-Household housing unit | 3 | 0 | 0% | 12 | 5 | 42% |
| Preservation of Affordable Units | Affordable housing | CDBG: \$942,342.36 HOME: \$32,085 | 2021 | 2025 | 23-Other - please specify | 23-Other - please specify | 33 | 5 | 15.15% | 33 | 5 | 15.15% |
| Fair Housing | Affordable housing | \$0 | 2021 | 2025 | 23-Other - please specify | 23-Other - please specify | 1 | 1 | 100% | 4 | 3 | 75% |
| Supportive Services for Homeless and At-Risk of Homelessness | Homeless | ESG: \$161,407.13 | 2021 | 2025 | 23-Other - please specify | 23-Other - please specify | 390 | 338 | 86.67% | 560 | 1,060 | 189% |
| Human Services | Non-homeless special needs | CDBG: \$350,063.00 | 2021 | 2025 | 3-Public service activities other | 3-Persons assisted | 2,247 | 1,224 | 54.47% | 2,500 | 6,407 | 256% |
| Architectural Access | Non-housing community development | CDBG: \$52,000 | 2021 | 2025 | 1-Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit | 1-Persons Assisted | 1,385 | 0 | 0% | 15,000 | 2,659 | 18% |

| Name of Goal | Category of Goal | Funds Expended in FY22 | Start Fiscal Year | End Fiscal Year | Goal Outcome Indicator (GOI) | GOI Unit of Measure | Outcome Expected FY23 | Actual Outcome FY23 | Percent Complete | Expected Outcome FY21-25 | Actual Outcome FY21-25 | Percent Complete |
|--|--------------------|------------------------|-------------------|-----------------|---|---------------------------|-----------------------|---------------------|------------------|--------------------------|------------------------|------------------|
| HOME CONSORTIUM | | | | | | | | | | | | |
| Administration | Affordable housing | HOME: \$139,359.80 | 2021 | 2025 | 23- Other (Organization) | 23-Other (Organizations) | 9 | 9 | 100% | 9 | 9 | 100% |
| Tenant Based Assistance for Rental Housing | Affordable housing | HOME: \$460,589.23 | 2021 | 2025 | 12-Tenant-based rental assistance / rapid rehousing | 12-Households Assisted | 49 | 72 | 27% | 150 | 144 | 96.00% |
| Rehabilitation of Existing Units | Affordable housing | HOME: \$799,669.60 | 2021 | 2025 | 8-Rental units rehabilitated | 8-Household housing unit | 0 | 0 | 233% | 83 | 10 | 12% |
| | | | | | 10-Homeowner housing rehabilitated | 8-Household housing unit | 0 | 0 | 0% | 3 | 0 | 0% |
| Production of Affordable Units | Affordable housing | HOME: \$100,000.00 | 2021 | 2025 | 7-Rental units constructed | 12-Households Assisted | 12 | 0 | 0% | 86 | 13 | 15% |
| | | | 2021 | 2025 | 9-Homeowner housing added | 12-Households Assisted | 0 | 0 | 0% | 0 | 0 | 0% |
| CHDO-Set Aside | Affordable housing | \$50,000.00 | 2021 | 2025 | 8-Rental units rehabilitated | 8-Household housing unit | 0 | 0 | 0% | 3 | 0 | 0% |
| | | | 2021 | 2025 | 7-Rental units constructed | 8-Household housing unit | 0 | 0 | 0% | 7 | 0 | 0% |
| CHDO Operations | Affordable housing | \$0 | 2021 | 2025 | 23 - Other (Organization) | 23 - Other (Organization) | 1 | 1 | 100% | 1 | 1 | 100% |

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.

In FY23 (FFY22), Newton and the HOME Consortium utilized CDBG, HOME and ESG funds to address the priorities identified in the FY21-FY25 Consolidated Plan and FY22 Annual Action Plan.

Relative to the production of new affordable housing, there are two projects nearing construction completion that receiving prior years CDBG and HOME funds from the City. The first is the Newton Housing Authority's (NHA) Haywood House project, which provides 55 new affordable units for seniors. Initial occupancy of Haywood House took place in May 2023, and project completion is expected in early FY24. The second project is the expansion of the Golda Meir House that is owned, developed, and managed by 2Life Communities. In FY21, the project was awarded FY18, FY20, and FY21 HOME funds to support the new construction of 57 one-bedroom apartments and 11 two-bedroom apartments. Of the 68 new units, 20 units are set aside for households earning 30% of the AMI and 25 units are set aside for households earning 50% of the AMI. All 45 of these units will have project-based vouchers. The Section 8 vouchers associated with the 30% AMI units support nine non-age restricted units for chronically homeless individuals with disabilities. Initial occupancy of the units occurred in April 2023 and full project completion is anticipated in the Fall of 2023.

A third housing production project, West Newton Armory, was allocated CDBG and HOME funds during FY23. A pre-commitment of FY24 and FY25 CDBG funds (total of \$930,000) and FY24 HOME funds (\$132,023.50), alongside the City's Inclusionary Zoning funds, will be used to develop the Armory into affordable housing with supportive services. The project is expected to be completed in FY26.

Newton's First Time Homebuyer Assistance Program served two households in FY23.

In FY23, the City continued to advance the CAN-DO Acquisition and Preservation project through the second phase: property rehabilitation. In FY20 (FFY19), the Newton Housing Authority received funding approval from the City's Planning & Development Board and Community Preservation Committee to acquire and preserve the CAN-DO affordable housing portfolio of 36 units across 13 scattered sites in Newton. Once the acquisition and debt reduction was complete in FY21, the City began working with the NHA to conduct lead testing and remediation where necessary, prepare project scopes of work, and begin the public procurement process to rehabilitate the properties, prioritizing the units with the greatest

infrastructure and safety needs. Rehabilitation on five of these CAN-DO units was completed in FY23 and work on the remaining 11 units will continue in the coming fiscal years.

In addition to the preservation of the CAN-DO portfolio, the City is actively preserving affordable senior housing at 2Life Communities' Coleman House with FY21 CDBG and FY22 HOME funds. These funds are being used to conduct a comprehensive rehabilitation of the building's mechanical systems and infrastructure, as well as accessibility design upgrades to each of the 146 units. The improvements will make the project more efficient and environmentally sustainable for the next several decades and will improve the quality of life for senior residents. Construction began in the Summer of 2021 and is expected to be completed in September of 2023.

Finally, following a substantial amendment, the City approved and committed \$100,000 in FY22 CDBG funds to the rehabilitation of Cascap's Nonantum Village Place (NVP). The scope of rehabilitation includes replacement of all three levels of roofing; installation of new insulation, siding, and trim; upgraded air conditioning systems; as well as painting of the entire building. Project work began in FY22 and will be completed in FY24.

Homeless prevention, rapid re-housing, street outreach, and shelter services were provided to 338 persons that were currently homeless or at-risk of homelessness through the ESG program.

Newton also maintains its existing affordable housing stock and increases the number of lead safe properties through the CDBG Housing Rehabilitation Program. The Program addresses code violations and eligible repairs. As previously mentioned, the City made progress on commencing the rehabilitation of the former CAN-DO portfolio (16 rental units for low-income households across 7 properties). The rehabilitation work on five CAN-DO properties was completed in FY23. These include: 61 Pear Street, 11-13 Cambria Road, 10-12 Cambria Road, 14 Nonantum Place, and 20-22 Falmouth Road. Also, in FY23, the City began reviewing new applications for the NHA's Pelham Street property and two homeowner projects.

In FY23, Newton continued to work with the Consortium to pursue the Analysis of Impediments to Fair Housing Choice (AI) recommendations and strategies to provide greater housing access to all constituencies. In particular, the Consortium contracted with the Housing Discrimination Testing Program (HDTP) at Suffolk University Law School to conduct a two-year Fair Housing testing study throughout the 13 HOME communities. Approximately ten tests will be conducted in each of the communities over two years to assess the level of race (black) and voucher-based discrimination in the rental housing market. Currently eight of the roughly 130 tests have been completed and thus far the results indicate no discrimination.

The parking cost associated with development was also identified as a potential barrier to affordable housing in the Consortium's AI report. To determine the existence of this barrier, the Consortium partnered with MAPC to complete a parking utilization study of over 40 large multi-family, mixed-income and affordable developments built since 2000. The WestMetro Parking Utilization Study Perfect Fit Parking Initiative Phase 4 memorandum, presented to the Consortium in July 2023, cited an oversupply of parking at the research sites. MAPC's policy recommendations include shifting parking minimums to maximums, reducing parking ratios, unbundling parking from housing costs, and exploring strategies for shared parking. These findings were discussed at the Fair Housing Committee meetings.

In January of 2023, the Newton Fair Housing Committee also consulted with the Suffolk School of Law Housing Discrimination Testing Program to educate the public about fair housing through presentation format training. The most recent training, "Fair Housing 101: Training for Real Estate Professionals," examined the history of the real estate industry, government's roles in racial discrimination, and best practices for real estate professionals. Real estate professionals were targeted for this training session, but the FHC also invited local committees and commissions.

Human service projects assisted 1,224 people in FY23. These projects provided support to families, children, youth, elderly individuals, and persons with disabilities.

During FY23, the city completed Phase I of the Marty Sender Trail Installation, an accessible pathway located at the Auburndale Playground. This project will close out in FY24. Additionally, the Department of Parks, Recreation, & Culture contracted with CDM Smith Inc. as the design architect for the construction of a fully accessible pathway around the perimeter of McGrath Park on Washington Street. Construction was recently completed on the installation of accessible crossings at Langley Road and Warren Street. This project will also close out in FY24.

The final grant funded by the CDBG-CV Small Business Recovery program was closed out by the city in FY23. Of the five subrecipients that received ESG-CV funding, three closed out in FY22. The Community Day Center's Shelter Rehabilitation as well as the Brookline Community Mental Health Center's Homelessness Prevention and Rapid Rehousing projects are expected to close out by September 2023.

WestMetro HOME Consortium Goals

In FY23 (FFY22), the WestMetro HOME Consortium received \$1,650,438.60 in HOME funds and expended \$1,544,505.63 in FY23 (FFY22) and prior year funds. Consortium communities shared three goals in FY23 (FFY22):

1. Tenant based rental assistance,
2. Rehabilitation of existing units, and
3. Production of affordable units

Tenant Based Rental Assistance programs are administered in five of the HOME Consortium communities. The programs in Bedford, Natick, Wayland and Waltham provide security deposit assistance and the first or last month's rent for income eligible households. Waltham and Framingham also offer full Tenant Based Rental Assistance programs that provide subsidies as vouchers to landlords to supplement the affordable rent paid by income-eligible households. During this program year, 72 Tenant Based Rental Assistance cases were closed out. This total includes 47 families in Waltham and 25 families in Framingham.

Consortium member communities laid the groundwork and continued to make progress on many affordable housing projects that will yield HOME-assisted units in subsequent fiscal years. For example, Belmont, Brookline, Framingham, Waltham, and Watertown each advanced public housing rehabilitation activities during the program year.

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 | ESG |
|---|-------|------|-----|
| White | 784 | 50 | 213 |
| Black or African American | 220 | 8 | 90 |
| Asian | 129 | 0 | 18 |
| American Indian or American Native | 6 | 0 | 1 |
| Native Hawaiian or Other Pacific Islander | 0 | 0 | 0 |
| Total | 1,142 | 58 | 322 |
| Other | 94 | 14 | 16 |
| Hispanic | 157 | 27 | 53 |
| Not Hispanic | 1,079 | 45 | 285 |

Table 2- Table of assistance to racial and ethnic population by source of funds

Narrative

In FY23, The City's CDBG program assisted a total of 1,236 persons through the provision of public services, housing rehabilitation projects and down payment assistance cases. The human service program served 1,124 persons; of these persons, 779 identified themselves as White, 218 identified themselves as Black or African American, 127 identified as Asian, six identified themselves as American Indian or American Native, and 94 persons identified themselves as multi-racial. A total of 156 of these persons were identified as Hispanic and 1,068 persons identified themselves as Non-Hispanic. Ten households were assisted through the rehabilitation of the five former CAN-DO housing projects. Seven of these households identified as White, two identified as Black and one as Asian. One household identified themselves as Hispanic and the remaining five households identified as Non-Hispanic Two homebuyers were served through the city's Downpayment Assistance program. One household identified as Asian, Non-Hispanic and the other household as White, Non-Hispanic.

The HOME program assisted 72 households in FY23. Tenant Based Rental Assistance programs across the Consortium served 30 extremely low, 23 low-income, and 19 moderate-income renter households. Fifty of these households identified themselves as White, eight identified as Black, and one as multi-racial. A total of 27 of the households identified themselves as Hispanic and 45 households identified as Non-Hispanic.

The ESG program assisted 338 persons. A total of 213 of these individuals identified as White, 90 individuals identified themselves as Black or African American, 18 identified themselves as Asian, one identified as American Indian or American Native, and 16 identified themselves as multi-racial. A total of 53 individuals identified themselves as Hispanic and 285 individuals identified themselves as Non-Hispanic.

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 | \$2,157,272.91 | \$1,866,096.83 |
| CDBG-CV | Public - federal | \$0 | \$11,412.74 |
| HOME | Public - federal | \$1,650,438.60 | \$1,544,505.63 |
| ESG | Public - federal | \$165,059.00 | \$161,407.13 |
| ESG-CV | Public - federal | \$0 | \$140,764.34 |

Table 2 - Resources Made Available

Narrative

The resources made available for CDBG, HOME and ESG include the FY23 (FFY22) annual allocation, program income, and prior year resources. Adjustments were made in IDIS to the Resources Made Available Table to reflect the receipt of CDBG and HOME program income, the accurate amount of ESG prior year resources, as well as the correct expenditure of CDBG, HOME and ESG funds in FY23 (FFY22). The supplemental funds the City received through the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) were also added to this table.

Identify the geographic distribution and location of investments

| Target Area | Planned Percentage of Allocation | Actual Percentage of Allocation | Narrative Description |
|-------------|----------------------------------|---------------------------------|-----------------------|
| N/A | 0.00% | 0.00% | See below |

Table 3 – Identify the geographic distribution and location of investments

Narrative

As the Community Development Block Grant (CDBG) is intended to predominantly serve low- to moderate-income residents, CDBG funding is allocated to projects that have a city-wide scope or directly impact low-to-moderate income beneficiaries.

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 uses CDBG, ESG, and HOME funds to leverage additional resources to expand the impact and increase the number of beneficiaries for each program.

In FY23, the public service (human service) projects leveraged approximately \$4,050,332 from private foundations and entities, organizational fundraising, state agencies, the City, and program fees. Private foundations and entities included: Perpetual Benevolent Fund, The Foundation for Racial, Ethnic and Religious Harmony, The Family Foundation, Rebecca Pomroy Foundation, Lawrence J. and Anne Rubenstein Charitable Foundation, Rotary Club of Newton, Eastern Bank, and United Way. The Massachusetts Department of Children and Families, Department of Developmental Services, Department of Early Education and Care, Department of Public Health/Office of Victim Assistance, and Department of Justice/Office on Violence Against Women also contributed leveraged funds to several public service projects.

During FY23 program year, the ESG program leveraged \$815,032.63. Most of the leveraged funds came from the state government while others came from organizations' own private funds and other resources.

There was no match requirement for the HOME program in FY23. However, the HOME Communities provided a match contribution in the form of cash, foregone taxes, fees or charges. The Consortium's FY23 total match amount is \$281,103.67. This amount will be carried over to FY23. Additional details on the matching funds for the HOME program can be found in Table 4 and Table 5.

In terms of publicly owned land, the City of Newton continues to work on the creation of nine units of permanent supportive housing for chronically homeless adults with disabilities. 2Life Communities, formerly Jewish Community Housing for the Elderly (JCHE) and owner of the Golda Meir House at 160 Stanton Avenue, was selected as the developer of the site and entered a Ground Lease with the City for the property. This new community will create 68 new units for low-income seniors through the construction of two additions to the existing Golda Meir House (which currently includes 197 units of affordable senior housing). The Golda Meir House Expansion Project will include 57 one-bedroom apartments and 11 two-bedroom apartments. Of the 68 new units, 20 will be set at 30% AMI and 25 will be set at 50% AMI. All 45 of these units will have project-based vouchers, which will allow 2Life to dedicate these units to extremely low and very low-income seniors. The Section 8 vouchers associated with the 30% AMI units will serve nine non-age restricted, one-bedroom units for chronically homeless individuals with disabilities.

The provision of special, supportive services for these nine individuals will be offered in partnership with HEARTH, Inc., a nonprofit organization dedicated to the elimination of homelessness among the elderly. Initial occupancy of the project occurred in April 2023 and full completion is anticipated in the Fall of 2023.

The city is also in the process of executing a land lease with Metro West Collaborative Development/Civico Development, to develop the West Newton Armory. In FY20, the Massachusetts Division of Capital Asset Management and Maintenance (DCAMM) offered ownership of the Armory to the Newton for \$1 if the city agreed to use the Armory for 100% affordable housing. Following a feasibility review by a citizen committee and housing consultant, the city agreed to DCAMM's terms and assumed ownership of the site. Metro West Collaborative Development/Civico Development proposes to construct 43 units of intergenerational housing affordable to households earning 30 to 60 percent of the AMI. The project is expected to be completed in FY26.

DRAFT

| Fiscal Year Summary – HOME Match | |
|--|--------------|
| 1. Excess match from prior Federal fiscal year | \$194,483.49 |
| 2. Match contributed during current Federal fiscal year | \$281,103.67 |
| 3. Total match available for current Federal fiscal year (Line 1 plus Line 2) | \$475,587.15 |
| 4. Match liability for current Federal fiscal year | \$0 |
| 5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4) | \$475,587.15 |

| 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 | Require d Infrastr ucture | Site Preparation, Construction Materials, Donated labor | Bond Financing | Total Match |
| Waltham TBRA (Various project numbers) | 07/01/2022- 06/30/2023 | \$238,901 | | | | | | \$238,901.00 |
| (3845) Carlson Crossing | 9/2/2021 | \$42,202.67 | | | | | | \$42,202.67 |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | TOTAL | \$281,103.67 | | | | | | \$281,103.67 |

HOME Program Income Report

| Program Income – Enter the program amounts for the reporting period | | | | |
|---|---|---|--------------------------------|--|
| Balance on hand at beginning 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 \$ |
| \$223,371.79 | \$31,600.60 | \$208,497.29 | \$454,300.87 | \$49,644.46 |

Table 4 – Program Income

HOME MBE/WBE report

| Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period | | | | | | |
|--|-------|-----------------------------------|---------------------------|--------------------|----------|--------------------|
| | Total | Minority Business Enterprises | | | | White Non-Hispanic |
| | | Alaskan Native or American Indian | Asian or Pacific Islander | Black Non-Hispanic | Hispanic | |
| Contracts | | | | | | |
| Dollar Amount | \$0 | 0 | 0 | 0 | \$0 | \$0 |
| Number | 0 | 0 | 0 | 0 | 0 | 0 |
| Sub-Contracts | | | | | | |
| Number | 0 | 0 | 0 | 0 | 0 | 0 |
| Dollar Amount | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| | Total | Women Business Enterprises | | Male | | |
| Contracts | | | | | | |
| Dollar Amount | \$0 | \$0 | | \$0 | | |
| Number | 0 | 0 | | 0 | | |
| Sub-Contracts | | | | | | |
| Number | 0 | 0 | | 0 | | |
| Dollar Amount | \$0 | \$0 | | \$0 | | |

Table 5 – Minority Business and Women Business Enterprises

| 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 | | | | | | |
|---|-------|-----------------------------------|---------------------------|--------------------|----------|--------------------|
| | 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 6 – Minority Owners of Rental Property

| Relocation and Real Property Acquisition – 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 | | 12 | | \$100,577.34 | | |
| Households Displaced | Total | Minority Property Enterprises | | | | White Non-Hispanic |
| | | Alaskan Native or American Indian | Asian or Pacific Islander | Black Non-Hispanic | Hispanic | |
| Number | 74 | 0 | 3 | 17 | 0 | 54 |
| Cost | \$300,952.98 | 0 | 0 | 0 | 0 | 0 |

Table 7 – 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 | 5 | 0 |
| Number of Non-Homeless households to be provided affordable housing units | 76 | 79 |
| Number of Special-Needs households to be provided affordable housing units | 51 | 0 |
| Total | 132 | 79 |

Table 8 – Number of Households

| | One-Year Goal | Actual |
|--|---------------|-----------|
| Number of households supported through Rental Assistance | 22 | 72 |
| Number of households supported through The Production of New Units | 55 | 0 |
| Number of households supported through Rehab of Existing Units | 19 | 5 |
| Number of households supported through Acquisition of Existing Units | 36 | 2 |
| Total | 132 | 79 |

Table 9 – Number of Households Supported

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

Although the City anticipated closing out at least one project, Nonantum Village Place, in FY23; construction was delayed due to the addition of solar panels to the roof. Nonantum Village Place, as well as the Golda Meir House Expansion, Coleman House Renovation, and Haywood House are expected to be closed out in FY24. Rehabilitation work on the former CAN-DO portfolio began in FY23 and five units were completed. Three additional units are expected to be completed in FY24. The complexity of scoping and prioritizing the layers of work, as well as collecting necessary legal documents from other funders, pushed the project timeline back. The City was also able to assist two income-eligible homebuyers during FY23 and anticipates being able to assist another three during FY24.

Belmont Housing Authority and Belmont Housing Trust continue discussions on opportunities to redevelop the Housing Authority's properties to increase the number of dwelling units and to target a broader range of household incomes. The program is more complicated than initially contemplated. The Housing Trust completed the Housing Production Plan and began working on the goals included in the Plan. The Belmont Housing Authority is planning to redevelop Sherman Gardens, a public housing complex for seniors and people with disabilities located in Belmont's Waverley Square neighborhood. The Housing Authority plans to begin rebuilding Sherman Gardens as a 135-unit affordable housing complex in September of 2025.

The communities of Bedford, Framingham, Natick and Waltham utilize HOME funds to run a Tenant Based Rental Assistance (TBRA) program providing households with security deposit assistance. The programs have proven successful in assisting low and moderate-income households in securing stable housing. To date, the Bedford and the Wayland TBRA Security Deposit Assistance program assisted nine and four households, respectively. An additional three households in Bedford and four households in Wayland were assisted as part of these programs in FY23, and these activities will close out in early FY24. Both municipal Security Deposit Assistance programs will continue in FY24. A total of 47 cases were completed in Waltham and 24 cases were completed in Framingham.

The Town of Concord has changed strategies for the planned two-bedroom, single-family house project owned by the Concord Housing Authority. Due to increased construction costs, the Concord Housing Authority is now partnering with Habitat for Humanity to build a homeownership unit to assist low-income households become homeowners.

Framingham's HOME funds were allocated to two Tenant-Based Rental Assistance programs. The first program provides security deposits and first or last month's rent for income eligible households. Tenants pay a portion of their income for rent in the second program, referred to as full rental assistance. The city also committed, via substantial amendment, over \$400,000 to the Framingham Housing Authority's Carlson Crossing. This phased project will rehabilitate 125 units and produce 7 units, including a total of ten HOME units.

In FY23, a total of \$369,677.60 in HOME funds were expended for Watertown's St. Joseph's Hall, a senior affordable housing project. These funds were used to replace the elevator and fund the relocation of the building's tenants during the construction. In recognition of the Town's limited HOME funds, Watertown has sought additional ways to increase the supply and types of affordable units, including Community Preservation Act funding and the passage of a linkage ordinance in 2023.

Discuss how these outcomes will impact future annual action plans.

As the region, nation, and world emerge from the Pandemic, it is the City of Newton's hope that the numeric goals of the Consolidated Plan will be achieved. The long and complicated development approval process in the City will continue to play a factor in limiting the opportunities for development in the City.

The Town of Belmont will continue to work with its housing authority on development projects. In Belmont this will be a redevelopment project for Sherman Gardens.

Bedford, Framingham, Natick, Waltham, and Wayland will continue Tenant Based Rental Assistance Programs. Sudbury and Lexington will work toward committing HOME funds to implement a TBRA Security Deposit Assistance program in FY24. Concord will advance the commitment of HOME funds for Christopher Heights, a new construction project slated to include 83 units of tiered affordable housing for seniors 62 years and older. Lexington aims to commit its FY21 and FY22 funds to the Lexington Housing Authority's Vynebrook project.

The Town of Brookline will be using HOME funds to rehabilitate six rental units at the Brookline Housing Authority's 154-156 Boylston Street Apartments. The Town will also oversee the progress of the Hebrew Senior Life (HSL) expansion at 108 Centre Street, a HOME-assisted age-restricted housing development project that includes 54 one-bedroom new rental housing units targeted to very low-income and low-income populations.

Due to the popularity of the Tenant Based Rental Assistance programs and its ability to house residents, the City of Framingham is exploring committing all of its FY25 HOME fund allocation to TBRA programs. Framingham will continue collaborating with nonprofit developers to create more affordable units in the community. The City is partnering with its local Housing Authority on Carlson Crossing, a phased project that will rehabilitate 125 units and produce 7 units, including a total of ten HOME units.

Natick will continue to focus HOME funds on Tenant Based Rental Assistance (TBRA), which in FY23 was managed by the Natick Service Council through an executed subrecipient agreement with the WestMetro HOME Consortium. In FY24, the Town will be working with the Regional Housing Service Office (RHSO) who may offer additional services to strength Natick's TBRA program.

Needham continues to work with the Needham Housing Authority (NHA) on its Preservation and Redevelopment Initiative (PRI) to improve and expand the supply of affordable units in the community. With CPA funding support from the Town, NHA brought on the Cambridge Housing

Authority as consultants to determine the most appropriate funding sources to refinance and reposition its inventory of units and support in the process of refinancing. The overall goals include completing improvements, producing new units, and enhancing its operations. Needham expects to allocate CPA and HOME funds to support these efforts.

With the potential of combining CPA and linkage fee funding with HOME and other funding sources, Watertown may be able to create new affordable units in future fiscal years without relying exclusively on Inclusionary Zoning. In addition, the City's new Affordable Housing Trust began operation in September 2022.

Waltham transitioned six TBRA assisted households into public housing. Public Housing Authorities' integration into the States CHAMP system for state assisted public housing has increased the wait period for public housing in Waltham to four or five years. This has severely impacted the number of full TBRA households moving into state assisted housing. Full TBRA households are now required to apply for both federal and state assisted Waltham public housing as well as maintain their status on the waitlist. Waltham has been fortunate in receiving program income from deferred down payment assistance loans, increasing the City's budget to extend the current TBRA assistance.

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 Persons Served | CDBG Actual | HOME Actual |
|---------------------------------|--------------------|--------------------|
| Extremely Low-income | 4 | 30 |
| Low-income | 5 | 23 |
| Moderate-income | 3 | 19 |
| Total | 12* | 72 |

Table 10 – Number of Persons Served

**Although only five units were counted in IDIS as part of the rehabilitation of the five former CAN-DO housing projects, ten households were assisted in those (five) units.*

Narrative

Newton’s CDBG funded Downpayment Assistance program served one low-income and one moderate-income household. Although only five units were counted in IDIS as part of the rehabilitation of the five former CAN-DO housing projects, ten households were assisted in those (five) units. These families served included four extremely low, four low-income, and two moderate-income households.

There were 72 households assisted by tenant based rental assistance programs in FY23. The renter households assisted met the Section 215 definition of affordable housing (as applicable to HOME grantees). Framingham’s Security Deposit Assistance program helped 11 extremely low income, eight low-income, and 6 moderate-income households. Waltham assisted 19 extremely low income, 15 low-income, and 13 moderate-income households with rental assistance.

Provide a summary of the efforts to address “worst case needs”, and progress in meeting the needs of persons with disabilities? *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 needs of persons with disabilities do not include beds in nursing homes or other service-centered facilities.*

In FY23 the City of Newton made progress on rehabilitating, constructing, and preserving several affordable housing projects that will provide units and support for households in worst case housing situations and persons with disabilities.

CDBG funds are being used in the development of the Newton Housing Authority’s Haywood House which will consist of 55 one-bedroom rental apartments. Three of the units are fully accessible for people with disabilities and four units are designated for households that have been homeless or are at risk of homelessness. The project also includes two elevators and community space for supportive services. Initial occupancy of Haywood House occurred in May of 2023, with project completion expected in early FY24.

The city continues to support 2LifeCommunities’ expansion of the Golda Meir House. This new community adds 57 one-bedroom apartments and 11 two-bedroom apartments. Of the 68 new units, 20 units are set aside for households earning 30% of the AMI and 25 units are set aside for households earning 50% of the AMI. All 45 of these units have project-based vouchers. The Section 8 vouchers associated with the 30% AMI units support nine non-age restricted units for chronically homeless individuals with disabilities. Initial occupancy of the units occurred in April of 2023, with project completion expected in Fall of 2023.

Through CDBG funds, the City is supporting the preservation of CAN-DO’s portfolio of 33 units across 12 scattered sites in Newton. The Newton Housing Authority officially closed on the acquisition of the portfolio in FY21 and spent the second half of the year working with the City to prepare scopes of work to rehabilitate these units. Rehabilitation work on the former CAN-DO units began in FY23 and five properties were completed. These units serve some of Newton’s most vulnerable households - extremely low- and low-income individuals who require a variety of supportive services.

Finally, following a substantial amendment, the City approved and committed \$100,000 in FY22 CDBG funds to the rehabilitation of Cascap’s Nonantum Village Place (NVP). NVP is home to older adult households earning less than 50% of the Area Median Income (AMI), with most residents earning less than 30% AMI. The rehabilitation will include replacement of all three

levels of roofing with additional insulation, siding and trim, and new HVAC systems, as well as painting of the entire building. Project work began in FY22 and will be completed in FY24.

Across the Consortium, Tenant-Based Rental assistance target homeless and other households that find themselves in a state of “worst case housing need.” In FY23, a total of 74 families were provided with security deposit assistance through Framingham’s and Waltham’s Tenant-Based Rental Assistance (TBRA) programs. Bedford, Natick, and Wayland also operate TBRA programs.

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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

- **Utilize, Evaluate and Adapt the Continuum of Care's Coordinated Entry System**

Following the merger of the Brookline-Newton-Waltham-Watertown (BNWW) Continuum of Care (CoC) with the Balance of State (BoS) CoC in FY17 (FFY16), efforts were quickly undertaken to ensure integration into the BoS CoC Coordinated Entry System. Comprised of over 80 communities, the BoS CoC provided the BNWW CoC with access to the many agencies already established within the CoC. The merger effectively maximized and expanded existing regional resources to better connect at-risk individuals and families with information, referrals, and assistance. Subsequently, BNWW CoC agencies integrated within the BoS CoC Coordinated Entry System by April 1, 2017. On March 16, 2017, training was facilitated at Newton City Hall with CoC agencies and local providers to discuss the BoS CoC Coordinated Entry process, Vulnerability Assessment tool, and referral requirements. Throughout FY23, BNWW CoC agencies attended the monthly BoS CoC planning group meetings to stay abreast on new changes made to the Coordinated Entry process.

The BoS CoC Coordinated Entry System provides a mechanism for housing the most vulnerable persons first, effectively focusing resources on those with the greatest need. Each provider within the CoC conducts a comprehensive assessment of an individual, make the appropriate referral(s) to efficiently connect them with safe housing and/or the appropriate services, design individualized strategies accordingly, and better understand homelessness in the Continuum and across the Commonwealth.

Addressing the emergency shelter and transitional housing needs of homeless persons

- **Carefully evaluate Shelter Services Allocation from the Emergency Solutions Grant**

In FY23, the City utilized ESG funds for emergency shelter services within the BNWW region to shelter people experiencing homelessness. Funds were expended to support case management services for individuals and families experiencing homelessness as well as shelter operations to keep the emergency shelter facilities up and running throughout the pandemic. Over the course of the FY23 program year, July 1, 2022 – June 30, 2023, \$99,035.00 in FY23 funds were expended for emergency shelter services. The need for emergency assistance remains present

in the CoC.

The BoS CoC, completed the 2023 Point-in-Time (PIT) Count on January 25, 2023. In addition, the BoS CoC created an electronic self-survey based on HUD's Interview tool. The self-survey was sent to libraries and drop-in centers throughout BoS CoC, to capture additional information on homeless individuals who may be utilizing those facilities. In 2023, a total of 4,432 homeless persons were counted throughout the entire BoS CoC service area. Of those, 3,627 persons were in emergency shelters; 318 homeless persons were in transitional housing programs; and 487 persons were unsheltered.

Of the total PIT Count, 290 homeless persons were counted in the Brookline-Newton-Waltham-Watertown region. Of those, 228 persons were in emergency shelters; 22 homeless persons were in transitional housing programs; and 40 persons were unsheltered.

While considering the current demand for emergency shelter services, the City continues to evaluate the appropriation of ESG funds against the homeless prevention and rapid rehousing components of the ESG program, which are more in-line with the CoC's Ten-Year Plan and HUD goals and objectives. Although there is a clear need and benefit for providing shelter services, the BoS CoC and City of Newton continue to support programs that strive towards permanent housing stabilization.

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

Creating and preserving permanent affordable housing that integrates supportive services often helps individuals and families with the greatest need. During FY18 (FFY17), the City undertook actions defined in its Housing Strategy to achieve Massachusetts' Chapter 40B "Safe Harbor" status, in which 10% of its housing stock are affordable for low- and moderate-income households, by 2021. Newton continues to advance its Housing Strategy completed in 2016, which addresses current and projected housing needs within the City. The report identified critical policy, regulatory and financial approaches to help the City become more efficient and effective in addressing these needs. An update to the City's Inclusionary Zoning Ordinance was one of ten priority actions listed in the Strategy, in addition to the reuse and disposition of municipally owned land at 160R Stanton Avenue (the Water Tower site) for the development of affordable housing for seniors and residents seeking supportive services.

2Life Communities' Golda Meir House Expansion Project, which converted underutilized, municipal land into affordable housing, is expected to be complete in early FY24. This project was awarded FY18, FY20, and FY21 HOME funds to support the new construction of 57 one-bedroom apartments and 11 two-bedroom apartments. Of the 68 new units, 20 units are set aside for households earning 30% of the AMI and 25 units are set aside for households earning 50% of the AMI. All 45 of these units have project-based vouchers. The Section 8 vouchers associated with the 30% AMI units serve nine non-age restricted chronically homeless individuals with disabilities. To successfully provide permanent supportive housing for these nine individuals, 2Life Communities partnered with Hearth, Inc., a nonprofit organization dedicated to the elimination of homelessness among the elderly through prevention, placement, and housing programs. Initial occupancy of the units occurred in April of 2023, and project completion is expected in Fall of 2023.

In September of 2021, the WestMetro HOME Consortium was awarded \$5,406,962 through the American Rescue Plan (ARP) Act of 2021. In FY23, the Barrett Planning Group, on behalf of the WestMetro HOME Consortium, prepared the required [HOME-ARP Allocation Plan](#), which outlines the strategy and planned expenditures of federal HOME-ARP funds from the U.S. Department of Housing and Urban Development (HUD). The Plan, which was submitted in March 2023, will assist the city in helping households experiencing homelessness, at-risk of homelessness, and those fleeing domestic violence. As explained in the HOME-ARP Allocation Plan, the Consortium will allocate HOME-ARP funds through the issuance of a Requests for Proposals, which is expected to take place in FY24. HOME-ARP funds must be spent by September 30, 2030.

Additionally, the BoS COC recently awarded many communities with NOFO funds, including \$24,325,315.00 awarded specifically to the Brookline-Newton-Waltham-Watertown region. This included \$609,365.00 awarded to The Second Step for Transitional Housing and Rapid Rehousing, \$73,132.00 awarded to Brookline Rental Assistance for the Chronically Homeless, and \$793,237.00 awarded to the Advocates Supported Housing Consolidation.

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

- ***Development of a Housing Strategy to identify sites for permanent supportive housing***

Following the directive of the United States Interagency Council on Homelessness (USICH) and the CoC's Ten-Year Plan to End Homelessness, the City focused efforts on developing permanent affordable housing integrated with supportive services. The Housing Strategy, completed in 2016, identified potential sites and strategies for the development of permanently affordable housing.

As part of this process, the City selected a 0.39-acre parcel (16,900 square feet) of municipally owned land, located at 160R Stanton Avenue, to reuse and create permanent supportive housing for chronically homeless adults with disabilities. In FY18, the City issued a Request for Proposals for the development of this underutilized site into permanent supportive housing for chronically homeless adults with disabilities. 2Life Communities, formerly Jewish Community Housing for the Elderly (JCHE) and owner of the Golda Meir House at 160 Stanton Avenue, was selected as the developer of the site and entered a ground lease with the City for the property. This new community created 68 new units for low-income seniors through the construction of two additions to the existing Golda Meir House (which currently includes 199 units of affordable senior housing). 2Life Communities proposed the addition of 68 affordable senior housing units, including nine units for chronically homeless individuals. In early August 2021, the financing was closed for the project and construction is in progress, with initial occupancy in April 2023.

- ***Prioritization of existing beds for chronically homeless individuals***

CoC recipients of federal McKinney-Vento Act competition funds continue to prioritize existing permanent supportive housing beds for chronically homeless individuals upon turnover whenever possible. Participating organizations include: Pine Street Inn, Advocates, and Vinfen. Twelve of these beds are located within Newton.

- ***Utilize Emergency Solutions Grants for Homeless Prevention and Rapid Rehousing***

In FY23, the City utilized ESG funds for homeless prevention and rapid rehousing services within

the BNWW region to reduce the number of individuals and families who are evicted from housing and ensure that those displaced find new housing quickly. These funds not only provided the financial resources to keep at-risk households housed but were also central in providing supportive services to help stabilize the household and ensure successful tenancies in the long term. During FY23 program year, July 1, 2022 - June 30, 2023, \$21,671.20 of FY22, and \$8,927.33 of FY23 funds were expended for homelessness prevention assistance. An additional \$4,686.19 of FY22, and \$9,422.26 of FY23 funds were expended for rapid re-housing assistance.

- ***Utilize existing resources and build relationship with mainstream housing providers***

Throughout FY23, the City partnered with nonprofit and for-profit developers to identify new opportunities for housing development and collaboration.

As noted throughout the Consolidated Annual Performance and Evaluation Report, the City is coordinating with affordable housing developer 2Life Communities on the development of 160R Stanton Avenue in Newton. 2Life Communities provides housing for nearly 1,500 older people throughout the greater Boston area, the majority of whom are extremely low-income. They are currently advancing efforts to redevelop the underutilized parcel with sixty-eight units, including the creation of nine units of permanent supportive housing for chronically homeless individuals with disabilities. 2Life Communities is also partnering with HEARTH, Inc., a nonprofit organization dedicated to the elimination of homelessness among the elderly, to provide supportive services for the tenants of these nine permanent supportive housing units. Considering the significant need in Newton for affordable housing, such partnerships present a unique opportunity to contribute meaningfully to the City's affordable housing stock.

The City of Newton also made significant strides during FY23 in its pursuit of redeveloping the West Newton Armory as 100% affordable housing, coupled with supportive services. After the City took ownership of the Armory in the Fall of 2021, Metro West Collaborative Development/Civico Development was selected as a development partner. The Metro West/Civico proposal includes 43 units of intergenerational housing affordable to households earning 30 to 60 percent of the AMI. During FY23, the Planning and Development Board approved a pre-commitment of FY24 and FY25 CDBG funds (total of \$930,000) and FY24 HOME funds (\$132,023.50), alongside the City's Inclusionary Zoning and Community Preservation funds, to develop the Armory into affordable housing with supportive services. The Armory project received its Chapter 40B Comprehensive Permit from the Newton Zoning Board of Appeals and submitted a One Stop Application to the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) for LIHTC financing in January 2023. In May of 2023, the West Newton Armory was one of 27 projects awarded state and federal tax credits, subsidy

funds, and ARPA funds by the Healey-Driscoll Administration. The project is expected to be completed in FY26.

Looking to FY24 and beyond, the City will continue to build upon these efforts and widen its network of housing providers to leverage existing resources.

- ***Create resources and referrals for at risk individuals and families.***

Following the merger of the BNWW CoC with the BoS CoC, efforts were quickly undertaken to ensure integration into the BoS CoC Coordinated Entry System. Comprised of over 80 communities, the BoS CoC provided the BNWW CoC with access to the many agencies already established within the BoS. The merger effectively maximized and expanded existing regional resources to better connect at-risk individuals and families with information, referrals, and assistance.

In FY21, the Massachusetts Department of Housing and Community Development (DHCD), the lead agency for the BoS CoC, conducted a region-wide needs assessment to obtain feedback from providers, direct care workers, and constituents regarding housing needs within the Brookline, Newton, Waltham, Watertown area. The BoS CoC hosted the first needs assessment meeting among BNWW CoC providers at the Community Day Center of Waltham on July 31, 2019. The City supported BoS CoC's outreach efforts and hosted the second needs assessment meeting at Newton City Hall on September 11, 2019. The assessment will culminate in a report that will inform future strategies and the allocation of resources for at-risk individuals and families.

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

Actions taken to address the needs of public housing

In accordance with its goal to develop additional affordable housing in the City of Newton, the Newton Housing Authority (NHA) is in the process of developing 55 one-bedroom units for elders with funding from the Low-Income Housing Tax Credit (LIHTC) program, Newton Community Preservation Act funds and CDBG funds, and HOME funds from EOHL. Initial occupancy of this project, Haywood House, occurred in May 2023 and full project completion is anticipated in the Fall of 2023.

The City works with the NHA through the CDBG Housing Rehabilitation program to address accessibility improvements and emergency repairs. The Newton Housing Authority strives to provide accessibility to as many affordable units as possible.

In 2021, the NHA acquired 36 units of affordable housing and is working with the City of Newton to complete capital improvements using CDBG Housing Rehabilitation funding.

Many HAs continue to look for creative ways to increase the supply of affordable housing and preserve existing public housing in their communities. Three strategies employed in Consortium communities are described below:

- Leverage HOME funds with other resources
- Utilize CDBG Funds to support public housing
- Reuse of underutilized property

The Belmont Housing Authority and Belmont Housing Trust continue discussions on opportunities to redevelop the Housing Authority's properties to increase the number of dwelling units and to offer the units to a broader range of household incomes. This project is more complicated than originally anticipated but the Housing Authority expects to proceed rebuilding Sherman Gardens as an approximately 135-unit affordable housing complex in FY26 (FFY25). Sherman Gardens is a state assisted public housing development.

Entitlement communities in the Consortium also utilize CDBG funds to support rehabilitation and capital improvement projects.

The Tribune Apartments and Hollis projects in Framingham, both completed in recent years, are evidence of the city's successful and strong partnership with the local Housing Authority (FHA). These projects range from ADA compliance upgrades to property acquisition and comprehensive rehabilitation of neighborhood properties. The City and the Housing Authority have made significant progress on their mutual goal of renovating new and older properties

within the FHA portfolio to eliminate neighborhood blight. In January, Framingham Housing Authority was awarded \$200,000 from the Consortium Consolidated Pool to put towards the rehabilitation and redevelopment of the FHA's Carlson Crossing. Financing for this project will not be finalized until the end of 2023 calendar year.

The Town of Needham approved \$150,000 in CPA funding to hire a consultant to help the Needham Housing Authority (NHA) identify and obtain the necessary financing for major modernization and redevelopment projects to upgrade its property inventory, referred to as its Preservation and Redevelopment Initiative (PRI). The Town also supported this effort by providing technical input into a Request for Proposals (RFP) through its Community Housing Specialist. The NHA Board of Commissioners approved the recommendation to hire the Cambridge Housing Authority as the consultant on June 24, 2021. Since then, NHA has made progress in moving the PRI forward, providing financing options, further evaluating NHA properties, and preparing financial pro formas and project plans, for example. The Town included PRI as a key component of its recently prepared Housing Plan that was coordinated by a working group of representatives from relevant boards and committees, including NHA, and at-large members of the community.

At its May 2022 Annual Town Meeting, the Town approved approximately \$1.4 million in CPA funding including \$1,386,000 to cover NHA predevelopment costs for its Linden-Chambers redevelopment and \$81,978 for a property survey at NHA's High Rack Estates site. It has further reserved another several million in CPA funding to support this work and additional CPA funding is anticipated. HOME Program funding is expected to be helpful in project financing as well.

The Watertown Housing Authority (WHA) continued making progress on modernization projects within the portfolio. Work on the asphalt walkway, parking lot, and site improvements for Woodland Towers development is complete at a total construction cost of over \$1 million. The new learning center at the Lexington Gardens development is finished, and now hosts staff computer lab and office hours. The WHA is meeting with several service providers, including EMPATH, with the hopes of providing consistent programming that will promote economic mobility and financial literacy for residents. In the last year, the WHA embarked on a major energy efficiency project, via the Mass LEAN program, by replacing outdated boilers across its entire state portfolio. This project is complete as of 2023, with overall taxpayer savings in excess of \$4 million dollars. The project to upgrade site accessibility at McSherry Gardens, and renovate its community room, laundry room, asbestos flooring, and kitchens is scheduled to begin in August 2023. This large-scale state modernization project (\$4 million) is the first interior renovation at the site since it was built in the late 1960s.

The Waltham Housing Authority (WHA) and the City have a long-standing partnership of collaborating financially and through effective project management to repair and improve public housing properties. In the FY23 program year, the City approved CPA funds to go towards the designs for two window replacement projects at WHA properties: the Arthur Clark Apartments and the Winchester Crane Apartments. Each project received a combined \$200,000 for window replacements in apartment complexes totaling 179 units.

The accessibility upgrades project at Grove St./Beaverbrook Apartments leverage a diverse funding stream of State, federal, and local sources to finance the project. The Beaverbrook Senior Apartments site is a 60-unit public housing development serving elderly and disabled residents at or below 50% of the City's AMI. The site, built in 1958 consists of 15 buildings with connecting walkways and a shared roofing system. Specifically, the project will utilize \$400,000 in CDBG funds, \$400,000 in HOME funds, and \$800,000 in MA Department of Housing and Community Development (DHCD) High Leverage Asset Preservation Program for Local Housing Authorities (HILAPP) State funds. The project, which is currently in the design phase is being managed by the WHA with assistance from the City.

In addition to capital improvements, the WHA receives an annual CDBG allocation for computer learning center after school programs sited at three family public housing locations.

Other strategies employed in Consortium communities to address public housing needs include reusing underutilized properties to support the creation of affordable housing. Waltham is currently in the process of renovating a surplus building in a former State-owned mental hospital into two new affordable units.

WestMetro HOME Consortium Public Housing Projects

| Project Name | Total Development Budget | Total HOME Funds | HOME Units | Total Units | HOME Funds Expended in FY23 | Project Status |
|------------------------------------|--------------------------|----------------------------|------------|-------------|-----------------------------|---|
| Haywood House | \$31,976,399 | \$450,000* (EOHLC HOME) | 11 | 55 | \$184,836.19 | Anticipated completion early FY24 |
| Sherman Gardens | \$70,100,000 | \$102,160 | 7 | 135 | \$0 | Construction to begin in Sept. 2025 (FFY25) |
| Carlson Crossing West (Framingham) | \$42,333,212 | \$442,118.74 | 7 | 68 | \$397,907 | Underway |
| Carlson Crossing East (Framingham) | \$42,782,461 | \$200,000.00 | ? | 57 | 0 | Pre-construction |
| Beaverbrook Apartments | \$2,405,170 | \$400,000 | 27 | 60 | \$0 | Design |

**Haywood House was awarded state HOME funds through the Massachusetts Executive Office of Housing and Livable Communities*

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

Currently the Newton Housing Authority (NHA) does not have any homeownership programs. The NHA Board of Commissioners is comprised of five individuals, one of which is a tenant of the Authority. The NHA also has a Resident Advisory Board for federal housing programs.

Consortium Communities

The Belmont Housing Authority (BHA) holds monthly meetings via Zoom or at one of two developments with adequate indoor space for community gatherings. Residents are encouraged to provide input in various projects undertaken by the BHA.

The Bedford Housing Authority will continue its social service program to connect families to the resources necessary to stabilize their living situation and improve their quality of life. The program will provide financial literacy education, skill training, career coaching, and other support services to a maximum of 15 low-income households currently residing in Bedford

public housing units.

Homeownership resale marketing opportunities are targeted to Brookline Housing Authority's (BHA) residents to expand opportunity and increase participation in homeownership opportunities in Brookline. In a lottery conducted in June 2021, one family from the Brookline Housing Authority was selected as prospective homebuyers for an affordable unit in Juniper Gardens. BHA staff work with residents to increase and maintain self-sufficiency through the acquisition of permanent affordable housing, health care, food assistance, mainstream resources, or any combination of these which offer an impactful way to reduce the number of recipients living at or below the poverty level.

Framingham's Community Development Department sponsors programs that offer financial, computer and written literacy; job search/training; GED preparation; English as a Second Language classes and other opportunities that support self-sufficiency. These programs are open to all community residents, including individuals living on housing authority properties. The Framingham Housing Authority also has a self-sufficiency program, which enables residents to save funds for a deposit on a home.

The Needham Housing Authority (NHA) works in strong partnership with its tenant organization at the Linden and Chambers elderly development. An NHA representative participates in meetings to address issues and concerns and to encourage residents to stay active and engaged in their community. The NHA has also established a Policy Review Committee to provide the executive staff with resident recommendations as the board seeks to update policies. The Authority updated its resident handbook to provide useful information to all tenants and established new grievance procedures. The establishment of additional tenant organizations has been encouraged by the NHA.

An important part of Needham's Preservation and Redevelopment Initiative (PRI) includes resident involvement with special meetings scheduled to keep residents updated on progress. The NHA is reaching out to neighbors as well.

The Watertown Housing Authority works with three Local Tenant Organizations (LTO) monthly and has official meetings each quarter. One of the associations also releases a monthly newsletter for its tenants. Each LTO has a budget and annually approved expense line items. The WHA aims to provide programming catered to the residents, with the LTOs helping to facilitate that conversation. A part of this dialogue, particularly with families, is the goal of assisting households to elevate their incomes and to move to market rate rents and homeownership programs as the "next stage" of affordable housing.

In Waltham, public housing residents may participate in the management and operations of the Waltham Housing Authority by attending Board of Commissioners meetings. These Commissioner meetings cover important matters concerning WHA management including policy decisions, budgets, and planning actions. The Board of Commissioners meetings provide opportunities for residents to address the Board and ask questions and provide input. The WHA is required to have one of its residents sit on the Commission and the resident Commissioner has one of five votes to determine policy and procedures for the WHA and represents residents' interests in the decision-making process. Additionally, the WHA maintains a Resident Advisory Board, comprised of federal Public Housing residents and Section 8 participants. This Board meets twice a year to discuss proposed capital improvement projects and the application of federal funds. At these meetings, the residents have an opportunity to make proposals regarding the use of funds for the needs of the residents.

The Wayland Housing Authority participates in the federal Family Self-Sufficiency (FSS) program. The FSS program encourages communities to develop local strategies to help Section 8 and public housing residents. Equally important, the FSS program provides support services and information to Section 8 voucher families to help them obtain employment that will lead to economic independence and self-sufficiency.

CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)

Describe 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 FY23, Newton continued its Zoning Redesign project. Zoning Redesign is the City of Newton's project to rewrite and redesign its Zoning Ordinance to create an easily understood, context-based ordinance that reflects current best practices, is forward thinking, but still preserves what is best about Newton.

The Zoning Ordinance is the major determinant of the locations, types and amount of housing that is permitted in the City. The Zoning Redesign process explored how this regulatory tool could better support the creation and preservation of affordable housing and the provision of Fair Housing throughout the City.

Beginning in FY20 and continuing in FY21, the City Council's Zoning and Planning (ZAP) Committee agreed to break down the Zoning Redesign work Article-by-Article (chapter-by-chapter). The Committee began with Article 3 - Residence Districts because the majority of work prior to 2020 focused on Newton's residential neighborhoods.

In FY21 (FFY20), the City extensively reviewed possible updates to its zoning ordinance in order to increase permitting flexibility and development incentives for affordable housing. Potential zoning revisions included: adopting controls which are less reliant on special permits or 40B approvals; facilitating both new development and the adaptation of existing housing to better serve needs of older and disabled residents; rewarding the provision of more affordable housing than the required share of affordable units or rewarding developments incorporating such provisions as "accessibility" and "visitability."

In the past two fiscal years (FY22 and FY23), the Zoning Redesign Project progressed to the City's consideration of zoning frameworks for village centers. This process included the presentation of proposed changes to existing village center boundaries for public feedback. These discussions focus on using zoning to encourage more diverse housing options near transit, and within and adjacent to business districts. Housing integrated in this way will achieve a structurally sustainable long term development pattern, which also supports greater opportunity for affordable housing in Newton.

Overall objectives of this project as they relate to housing include incorporating fair housing requirements, definitions, and standards; directing multi-family and mixed-use development to transit and job-oriented locations; permitting a range of neighborhood scaled, multi-family building types; and strengthening the ordinance to better meet the vast and diverse housing needs of Newton today, including encouraging and supporting the development of more affordable units throughout the City.

After extensive City Council discussions and public listening events attended by hundreds of City residents across three years, the City expects to present the final iteration of the zoning ordinance revisions and accompanying maps in FY24.

Consortium Communities

The Town of Belmont adopted a Housing Production Plan in May 2023 that identifies goals and strategies for producing affordable housing units in town. Belmont worked to increase production of affordable housing through approval of both special permit and comprehensive permit projects. A zoning amendment to rezone McLean District Zone 3 to provide 6 affordable homeownership units and 28 affordable rental units was passed at Special Town Meeting in the fall of 2020. As the Town implements new Massachusetts General Law c. 40 Section 3A Guidelines requiring multifamily housing, one consideration is to include state Housing Authority properties in multifamily districts to allow for redevelopment and the addition of more public housing units.

In FY23, Bedford, Concord, Lexington, and Sudbury continued work on developing zoning and other local development incentives to promote the inclusion of affordable units in new developments under the MBTA Zoning.

Brookline supported the Brookline Housing Authority in FY23, owner and manager of the largest affordable housing portfolio in the Town. There is a long-recognized priority for the Town to assist the BHA with its preservation efforts, including addressing capital needs and partnering on development opportunities, when the BHA can increase the Town's supply of affordable housing units. In FY23, the Town of Brookline continued working with the Brookline Housing Authority on Phase 1 and Phase 2 of a multi-year Strategic Preservation Initiative. This project took advantage of HUD's Rental Assistance Demonstration Program as well as federal and state tax credits and state and local subsidies to rehabilitate and preserve nearly 500 units of affordable public housing in six different properties.

Less than 10% of Brookline's residential building stock is designated as affordable, as defined by the requirements of MA Department of Housing and Community Development's Subsidized Housing Inventory (SHI). For this reason, Brookline has experienced a continued influx of development proposals that utilize the comprehensive permitting process established by Massachusetts General Law, Chapter 40B. Town departments provide organized input and administration on these proposals, with the intent to produce affordable housing that effectively meets the needs of all Town residents and remains permanently affordable. Overall, Brookline continued to require, through its zoning bylaw, the provision of affordable housing from all new developments of four or more units.

Framingham's Inclusionary Zoning bylaw addresses impediments to affordable housing by ensuring a long-term supply of affordable housing, promoting a mix and distribution of affordable housing throughout the community, and helping the community maintain 13 percent affordability as set forth in M.G.L. Chapter 40B. The City requires that 11 percent of the units in housing developments with 10 or more units be affordable to households at or below 80% of the median income and 2% to households earning at or below 60% AMI.

Natick has been actively reviewing and updating its Zoning Bylaws. At the 2023 Spring Town Meeting, Town Meeting approved a new Inclusionary Housing and Open Space Cluster Development provision. Natick is exploring further zoning amendments to encourage the creation of smaller and barrier-free homes.

Since the Needham Housing Plan was approved in January 2023, the Town has pursued the implementation of the following recommended strategies:

- Developing an amended Accessory Dwelling Unit (ADU) bylaw that allows the by right approval of ADUs in existing single-family structures, also eliminating the previous occupancy requirement of either a family member or caregiver.
- Adopting new zoning under Section 3A of the Zoning Act to create a district or districts where multi-family housing of at least 15 units per acre will be allowed by right.
- Obtaining technical assistance from the Citizens Housing and Planning Association (CHAPA) in its Municipal Engagement Initiative (MEI) to create greater local community engagement and collaboration towards the implementation of the Housing Plan.

The largest barrier to affordable housing Waltham residents experience is the cost of housing driven by a lack of supply, inflation, and other market conditions. The City of Waltham, much like all of eastern Massachusetts has experienced year-over-year sustained surges in median home and rent prices. The June 2023 median home listing price in Waltham was \$810,000,

versus \$700,000 in June of 2022, which is an increase in over 15 percent (realtor.com). This unaffordability of homes makes homeownership increasingly out of reach for low-moderate income individuals/families and disadvantaged groups. Additional barriers such as high land costs and lack of developable new land also exacerbate housing costs. Furthermore, at public meetings and community input sessions, public sentiment expressed against new construction of multi-unit market rate and luxury apartment/condo buildings due to concerns related to traffic congestion constitutes barriers of affordable housing creation.

To ameliorate barriers to affordable housing, Waltham renovates surplus City-owned buildings into multi-family apartment buildings. In the 2022-2023 program year, the City funded \$1,179,000 in Municipal Affordable Housing Trust dollars to conduct exterior renovations at the Cardinal Cottage building with the goal of creating two new affordable units. This historic building in the former Fernald Development Center site is slated to be fully renovated by 2024 and will add much needed affordable housing to North Waltham. The Cardinal Cottage will be added to the roster of other city-owned buildings that offer affordable housing including the Hardy Apartments for senior citizens; which was a former school building.

In addition to supporting WHA projects, CPA funds are also allocated throughout the City for both private and City-owned affordable housing projects. In May 2023, a \$6M contract was signed to begin the Leland Homes Redevelopment using CPA funding. This project will create 66 apartments at 60% AMI for senior citizens in Waltham. This project was originally approved for CPA funding in August 2021.

Waltham also works to increase production of affordable housing through approval of both special permit and comprehensive permit projects to provide zoning relief to new construction of multi-family properties. In 2022-2023, the City conducted seven City Council Special Committee Public Input Meetings in each ward to solicit input on community development goals including housing creation and barriers to affordable housing as part of its process to update its Master Plan. In addition, targeted Master Plan input sessions were held with City Departments, Waltham senior citizens, Waltham veterans, and social service/non-profit organizations. The goal of the updated Master Plan will be to identify and address barriers to affordable housing in addition to recommending best practice land use, tax policies, zoning ordinances, building codes, and other policies. These meetings began in September 2022 and are continuing into 2023.

Watertown adopted a five- year Housing Plan in March 2021. The following strategies to address barriers to affordable housing are included in the Plan: creation of a municipal affordable housing trust to facilitate the combination of funding sources; consideration of a

“nexus” fee paid by commercial developers to fund creation of new affordable housing required by job creation; discussion of a potential amendment to the zoning ordinance to allow accessory dwelling units in at least some circumstances; and a short-term rental assistance program. As noted earlier, the Watertown Affordable Housing Trust began operation in September 2022. In FY23, following a “nexus” study and home rule petition, the City Council approved a linkage fee on new commercial development with the proceeds to be dedicated to affordable housing. Because of the transition to the Affordable Housing Trust this past fiscal year, consideration of a new accessory dwelling unit ordinance is presently on hold. The City continues to have a tax abatement, deferral, and exemptions program.

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

The City has already surpassed expected five-year outcomes in its support of affordable homeownership, provision of human services goals, and assistance for homeless and at-risk of homeless. Actions and strategies to position the city and the WestMetro HOME Consortium to continue to address these goals as well as the other goals in the FY21-25 Consolidated Plan are identified in CR-20: Affordable Housing and CR-45: CDBG.

During FY23, funding was allocated to various projects designed to provide direct services, remove architectural barriers, and improve accessibility for low-and-moderate income individuals, families, and traditionally underserved populations. Efforts included the installation of the Marty Sender Trail (Phase I) and an accessible crossing at Langley Road and Warren Street.

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

Newton’s Housing Rehabilitation program uses CDBG funding to provide grants to income-eligible homeowners to remove lead-based paint, asbestos and other health hazards. The program also offers these homeowners zero-interest loans to fix building and safety code violations. The rehabilitation program was expanded in FY16 to offer assistance to income-eligible homeowners to bring pre-existing accessory apartments up to appropriate health and safety standards and again in FY18 to assist organizations and landlords that own lodging homes in Newton. Housing funds can be used to aid income-eligible tenants to create more affordable housing and to bring pre-existing lodging housing up to appropriate health and safety standards.

The WestMetro HOME Consortium ensures that all HOME-assisted projects comply with applicable requirements of the Lead-Based Paint Poisoning Prevention Act, 42 U.S.C. 4821, et.

seq.; Residential Lead-Based Paint Hazard Reduction Act of 1992 and all future revisions and amendments, as well as, comply with such Lead-Based Paint regulations as may be adopted pursuant to HOME Program regulations and with the requirements of the Massachusetts Lead Paint Statute, M.G.L. c.111, ss190-199A.

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

Funds from the City's Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME), and Emergency Shelter Grant (ESG) programs are administered locally for programs and projects that target and provide the maximum benefit to extremely low- and moderate-income persons. These resources provide rental assistance, housing stabilization and relocation services, access to emergency shelter, and support for the creation and preservation of affordable housing.

The City worked closely with human service agencies whose projects provide a direct benefit to low-to-moderate income residents and move these vulnerable individuals and families out of poverty. The City selected proposals that focused on stabilizing low-to-moderate income individuals and families across the lifespan.

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

During FY23, the Division continued to strengthen its relationships with city departments, stakeholder groups, community organizations and City partners. Housing and Community Development Division (the Division) staff worked with the Fair Housing Committee to ensure fair and adequate housing options through community education and input on proposed affordable housing developments. Division staff also met with the Commission on Disability to identify accessibility needs and projects for funding, as well as report on ongoing accessibility improvements. The Planning and Development Board regularly reviews recommendations for the CDBG and HOME programs, developed through coordination with staff and these advisory committees, and render final funding recommendations to the Mayor. The City continued to collaborate with the recently reinvigorated Newton Housing Partnership, which plays a key role in carefully reviewing proposed projects seeking to create and preserve affordable housing within the Newton community. In combination, this system provides a strong link between the City and its citizens, nonprofit organizations, business owners and other community agencies.

Additionally, community and regional relationships are critical to streamlining housing development, leveraging project funds and meeting community needs. Division staff met regularly with the Newton Housing Authority to advance and prioritize projects and public housing needs. City staff also maintain collaborative efforts with nonprofit housing organizations, state agencies, and housing developers to increase affordable housing

opportunities in Newton. As the lead community for the WestMetro HOME Consortium, Newton works closely with representatives from member communities on administrative matters and to exchange project ideas and information. The City partners with these aforementioned entities, and state and federal-level agencies, to enhance the coordination of services and to leverage additional funding to better assist low- and moderate-income residents.

Even following the City of Newton's FY17 merger to the MA Balance of State (BoS) CoC, Division staff continues to closely coordinate with the BoS CoC, area service providers and municipal representatives to inform ESG allocations, refine processes and procedures, and strengthen the overall ESG program. The BoS CoC meets on a regular basis throughout the year to exchange information, best practices and forge partnerships in developing strategies to end and reduce homelessness within BoS communities.

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

The Housing and Community Development Division (the Division) has focused on developing and managing strong partnerships and relationships to enhance coordination between service providers. As mentioned above, strengthened collaboration with organizations like the Newton Housing Authority, human service agencies, housing providers and regional entities, play a critical role in ensuring the cost-effective, efficient delivery of services and housing opportunity to the public.

Since a portion of housing rehabilitation applicants are economically disadvantaged, elderly, and/or in need of social services, Division staff work in close consultation with the Newton Senior Center, the community social worker, the Newton Hoarding Task Force and the Cousens Fund. The Hoarding Task Force is comprised of the Department of Public Health, the Fire Department, Police Department, Newton Housing Authority, Health and Human Services, Senior Center, and Child Protective Services. Together, this task force has established a protocol to ensure that cases are referred to the appropriate departments and more effectively serve the impacted clients.

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

Newton and the WestMetro HOME Consortium's most recent (FY21-FY25) iteration of the [Analysis of Impediments to Fair Housing Choice \(AI\)](#) was submitted to HUD in FY21. The AI is an

assessment of state and local government's bylaws, ordinances, statutes, and administrative policies and local conditions that affect the location, availability, and accessibility of housing. In FY23, Newton continued to work with the Consortium to pursue the AI's recommendations and strategies to provide greater housing access to all constituencies.

In particular, the Consortium contracted with the Housing Discrimination Testing Program (HDTP) at Suffolk University Law School to conduct a two-year Fair Housing testing study throughout the 13 HOME communities. Approximately ten tests will be conducted in each of the communities over two years to assess the level of race (black) and voucher-based discrimination in the rental housing market. Currently eight of the roughly 130 tests have been completed and thus far the results indicate no discrimination. One test hinted at discrimination and further testing will be conducted before deciding if it is appropriate to send to an enforcing agency.

The parking cost associated with development was also identified as a potential barrier to affordable housing in the Consortium's AI report. To determine the existence of this barrier, the Consortium partnered with MAPC to complete a parking utilization study of over 40 large multi-family, mixed-income and affordable developments built since 2000. MAPC drew upon an analysis of property surveys and overnight parking counts to determine parking demand per unit. The WestMetro Parking Utilization Study Perfect Fit Parking Initiative, Phase 4 memorandum presented to the Consortium in July 2023, cited an oversupply of parking at the study sites. MAPC's policy recommendations include shifting parking minimums to maximums, reducing parking ratios, unbundling parking from housing costs, and exploring strategies for shared parking. The Fair Housing Committee is scheduled to discuss these findings at their upcoming meetings.

In January of 2023, the Newton Fair Housing Committee also consulted with the Suffolk School of Law Housing Discrimination Testing Program to educate the public about fair housing through a presentation format training. The most recent training, "Fair Housing 101: Training for Real Estate Professionals," examined the history of the real estate industry, government's roles in racial discrimination, and best practices for real estate professionals. Real estate professionals were targeted for this training session, but the FHC also invited local committees and commissions.

Finally, in FY23, the Newton Fair Housing Committee developed a list of monthly meeting agenda items that align with the recommended AI strategies. These include:

Fair Housing protected groups

- Promote housing choice for diverse populations to advance Affirmatively Furthering Fair Housing (AFFH), with a focus on race/ethnicity, public subsidy, and disability
- Promote diversity, equity, inclusion and belonging in Newton
- Promote effective processes/practices for new affordable homeownership and resales
- Promote improved practices for real estate professionals to achieve more housing choice for diverse populations
- Identify and work to overcome barriers to successful tenancies and to improve processes for tenant selection in lottery and market rate multifamily rental housing

Learning/Teaching

- Enhance fair housing literature, website information and access for the public
- Promote Fair Housing training for real estate professionals, landlords, tenants, the public and committee members

Data and analysis

- Promote data collection on multi-family rental and new homeownership occupancy
- Enhance project review of housing developments to advance AFFH
- Support fair housing testing in Newton and the Consortium

Collaboration

- Collaborate with related Newton Commissions and Committees to increase affordable housing for households of various sizes and lower incomes and to encourage increased funding for affordable housing
- Promote affordable housing production in coordination with other City commissions and committees
- Support federal, state and city initiatives that promote AFFH
- Collaborate with Human Rights Commission on fair housing complaint process
- Contribute to Newton's Fair Housing related plans
- Address committee membership appointments with representation from Human Rights Commission and legal counsel with Fair Housing specialty

Consortium communities

In May of 2023, Belmont adopted a Housing Production Plan with strategies for adding housing diversity, to offer incoming households more housing options, and enable residents to remain in Town as their needs change.

Brookline identified three impediments to fair housing and complementary actions to address each barrier:

- Impediment # 1: Lack of affordable housing, particularly for low-income households, with an increased proportion of low-income households experiencing inadequate or cost-burdened housing.

The Town continues to support efforts to provide affordable housing resources through federal and local resources, ranging from current by-law inclusionary policies to funding opportunities available for affordable housing activities.

- Impediment # 2: Lack of public information about fair housing law rights and responsibilities.

The Town continued to work with the Brookline's Commission for Diversity, Inclusion, and Community Relations. The mission of the commission is to promote fair housing, cooperation, tolerance, and respect by advancing, promoting and advocating for the human and civil rights of all through education, awareness, outreach and advocacy. Fair housing information is disseminated through the Town's website and provides the public with information about housing discrimination law and fair housing practices, enforcement, and individual counseling.

- Impediment # 3: Regulatory land use and zoning barriers to the production and preservation of housing for low-income households.

The Brookline Housing Advisory Board promotes the production and preservation of housing affordable to low, moderate, and upper-moderate income households. One of the goals of the board is to make recommendations to the Planning Board and Zoning Board on affordable housing needs, policies and programs. The policies are in alignment with the oversight of federal and state fair housing laws.

In FY23, the RHSO partnered with MetroWest Legal Services and hosted a Tenant Rights' Presentation for its communities including Bedford, Concord, Lexington, Sudbury and Wayland, with a cumulative total of 48 attendees. The presentation focused on the rights and responsibilities of tenants with respect to lease types/options, eviction procedures, court proceedings, reasonable accommodations, etc. Legal aid and rental assistance resources were also provided to attendees.

The Framingham's Fair Housing Committee is restructuring. The Committee expects to be able to engage in fair housing and housing related projects more effectively once this is complete.

Natick started preparing a Racial Equity Municipal Action Plan (REMAP) in 2021 with the assistance of the Metropolitan Area Planning Council (MAPC). This instrument will leverage the power of governmental collective action to achieve a range of tangible improvements in community-level economic outcomes including, but not limited to, implementing policies and practices to reduce the racial wealth divide. The Natick Select Board bolstered this initiative by

issuing a proclamation confirming the Town's commitment to fair housing in the Spring of 2021.

Since the WestMetro HOME Consortium's FY21 Analysis of Impediments, Watertown has continued to work on implementation steps, including:

- In 2021, the City created a system for collecting and tracking fair housing complaints and posted it on the municipal website. There was one fair housing complaint submitted in the last fiscal year.
- In FY23, 19 Watertown developments were included in the previously referred parking utilization study by Metropolitan Area Planning Council to test whether parking requirements for new multifamily development are justified by demand. The results of this study will be discussed in the coming fiscal year.
- Finally, Watertown voted this past fiscal year to participate in the fair housing testing program that will begin in the second half of 2023.

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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

Please refer to the Appendix for the monitoring policies and procedures of the City and WestMetro HOME Consortium.

The City of Newton is the lead entity of the 13-member WestMetro HOME Consortium. Prior to FY19, the Consortium's annual HOME Program was monitored by FinePoint Associates, a private firm that provides monitoring services and technical assistance. In FY20, the City of Newton, as representative member of the WestMetro HOME Consortium, monitored FY19 HOME-funded activities (including Newton's own projects) that were identified through the WestMetro HOME Consortium's Risk-based Monitoring Plan. The City continued this role in FY21 with monitoring FY20 HOME-funded activities and began monitoring FY21 HOME-funded activities in FY22. In FY23, Newton continued to monitor FY21 HOME funded activities and FY22 activities. This monitoring is ongoing with the expectation of being complete in FY24.

Annually, the City prepares a risk assessment that takes into account the timing of an agency's last monitoring visit, whether a project is new, staff turnover, previous concerns and necessary follow-up, inconsistent submissions of reports or requisitions, and the agencies' ability to meet projected outputs and outcomes over the course of the program year. As a result, the risk assessment identifies human service and ESG projects that the City will monitor each year.

While a minimum of ten percent of all human service and ESG projects are required to be monitored each year, thirty-five percent of Newton's human service portfolio and four activities in Newton's ESG portfolio were identified for monitoring for the end of FY23. The five human service projects (35%) were monitored in April and May of 2023. The four ESG activities were monitored in May 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.

The draft Consolidated Annual Performance and Evaluation Report (CAPER) was posted to the City's website on August 30, 2023. It will be presented at the Annual Performance Public Hearing on September 14, 2023, during the Planning and Development Board meeting.

Hard copies of the CAPER will be made available to the public throughout the 15-day comment period (September 14 through September 28, 2023). According to the City's Citizen Participation Plan, copies of the CAPER were available in other formats and in other languages, although no requests were made. In addition, notice of the draft CAPER's availability and the date of the Annual Performance Hearing was included in the Planning and Development Department's weekly report that is distributed digitally to several hundred recipients, including local nonprofits and other organizations serving low- and moderate-income individuals and minorities. A notice for the public hearing was published in the Boston Herald as well as in the MetroWest Daily News during the week of August 27, 2023. The notice provided contact information for the City's ADA Coordinator, and telecommunications relay service, for anyone that sought to request a reasonable accommodation.

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.

The CDBG goals for the period covered by the FY21-25 Consolidated Plan have included: production of new affordable units, support of affordable homeownership, preservation of affordable housing, rehabilitation of existing units, increase awareness of fair housing policies and practices, provision of human services, and implementation of architectural accessibility improvements. In FY23, the City continued to make progress in executing these goals through the completion and ongoing work of activities identified in section CR-05: Goals and Outcomes.

No programmatic changes were made in FY23 that departed from the plans established in the FY21-FY25 (FFY20-FFY24) Consolidated Plan.

Consistent with the City's desire to address the need for affordable housing through a programmatic funding shift, \$1,229,372 in FY23 CDBG funds were allocated toward the development and rehabilitation of affordable housing. Initial occupancy of Newton Housing Authority's Haywood House began in May of 2023. This housing production project, which was awarded FY20 and FY21 CDBG funds, created 55 new affordable rental units for seniors. CDBG funded rehabilitation work on five of the 16 CAN-DO portfolio units wrapped up in FY23. Two first time homebuyers were assisted during the program year.

In FY23, Suffolk University Law School began a two-year Fair Housing testing study throughout the 13 HOME communities to assess the level of race (black) and voucher-based discrimination in the rental housing market. At this point, eight of the roughly 130 tests have been completed and thus far the results indicate no discrimination. In July of 2023, MAPC also rolled out the findings of a parking utilization study which cited evidence of an oversupply of parking spaces at multi-family housing developments in the WestMetro HOME communities. These findings were discussed at the Fair Housing Committee meetings. Both studies were designed to respond to specific recommendations in the most recent Analysis of Impediments.

The Division continued to work with its full-time ADA Coordinator. This position staffs the Commission on Disability, which provides project recommendations for the CDBG-funded architectural access program. The ADA Coordinator is also a valuable resource for ensuring that both City and CDBG access projects comply with state and federal accessibility regulations and guidelines. In FY23, the City installed an accessible pathway at Auburndale Playground and

accessible crossings at the intersection of Langley Road and Warren Street. These projects improved accessibility and mobility for persons with disabilities.

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CR-50 - HOME 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

The following HOME assisted units were inspected during the past year:

- 447 Concord Road, Bedford
- Waverly Woods/Olmstead, Belmont
- 86 Dummer Street, Brookline
- 51-57 Beals Street, Brookline
- 282-294 Thoreau Street, Concord
- 236 Auburn Street, Newton
- 61 Pearl Street, Unit 2, Newton
- 61 Pearl Street, Unit 3, Newton
- 390 Newtonville Ave, Newton
- 17 Edmands Road, Framingham*
- Shillman House, Framingham*
- Memorial House, Framingham
- 6 Plain Street, Natick
- Coolidge House, Natick
- 1751 Washington Street, Newton
- 82-86 Orange Street, Waltham
- 75-85 Myrtle Street, Waltham
- 101 Prospect (Winchester Crate Apts), Waltham
- 35 Marguerite Ave, Waltham
- 120 Mount Auburn Street, Watertown
- 319 Arlington Street, Watertown

* These properties have already conducted monitoring. The remainder are currently in the process of being monitored.

Of the properties inspected to date, 236 Auburn Street, 61 Pearl Street Unit 2, 61 Pearl Street Unit 3, and 390 Newtonville Avenue, all in Newton, failed inspection. The property at 236 Auburn Street failed inspection due to unsatisfactory conditions and concerns related to roof structure, the exterior chimney and flue lining, siding, foundation walls, basement windows, outside electrical outlets, gutters, downspouts, deck, railing, porch, exterior doors, insulation, visible waste and vent pipes, gas piping, circuit breakers and visible wiring, dryer vent, circuit breakers, the presence of smoke detectors, walls and ceilings, visible waste pipes, cabinets and countertops, bathroom exhaust fan, and the tub faucets and showerhead.

The properties on Pearl Street and Newtonville Avenue are currently undergoing rehab. Pearl Street's bathroom vanity is being completed, and its porch guard rail is being replaced, along with its vinyl casements. Newtonville Avenue's windows, floor condition, stove, kitchen sink, and kitchen cabinets and counters were in poor condition and caused the inspection's failure. The Housing Authority will schedule a follow-up inspection once the work is complete at the properties on Pearl Street and Newtonville Avenue.

Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 92.351(b)

The WestMetro HOME Consortium's Affirmative Marketing Plan is utilized by all communities to guide the marketing process and requirements for all HOME-assisted units. The Plan was developed to align with the requirements of the 24 CFR 92.350 HOME regulations. In addition, many of the affordable units are developed under the M.G.L. 40B Guidelines and are subject to the stringent requirements of the state-run program.

Each community's approach and oversight varies. For example, in Bedford the Bedford Housing Partnership reviews and approves all marketing plans for developments with affordable units, for compliance with the appropriate regulations. The Coolidge at Sudbury II utilized an Affordable Housing Marketing Plan that met both the Consortium guidelines and the State 40B Guidelines for the initial and ongoing leasing of units. For all communities, a large component of the marketing plan requires the developer to specifically list the methods they will use to affirmatively market the units. For HOME assisted units that are state-funded public housing units, Massachusetts regulation 760 CMR 5 outlines eligibility and selection criteria. The Common Housing Application for Massachusetts Public Housing (CHAMP) application system is used for these units.

All affordable developments in the Town of Belmont are required to create Affirmative Fair Housing Marketing Plans.

Brookline utilizes an extensive list of outreach methods required for affirmatively marketing new affordable units to ensure that equitable access to government-assisted housing and inclusionary developments occurs. This includes advertising in local minority newspapers; and direct mailings to local community organizations; churches and synagogues; and a robust email distribution system to a listserve of over 4,000 households interested in affordable housing opportunities in Brookline. The Housing Division provides technical assistance to developers/managers in the preparation of affirmative marketing and tenant/buyer selection plans, and by pre-approving plans before the subsidizing agencies. During the program year, four marketing plans were reviewed and approved and four lotteries were held for affordable units.

In Framingham, all developers with active HOME rental units have written affirmative marketing plans. These developers include the Framingham Housing Authority, Jewish Community Housing for the Elderly, SMOC, Beacon Communities and others with plans in circulation among residents of their facilities. Each entity includes a series of provisions that outline residents' rights and the process of marketing units to all potential clients. Site monitoring visits by the City confirm the provisions meet HUD requirements that applicants receive "equal housing opportunities regardless of race, color, national origin, religion, sex, familial status, or disability."

The Needham housing specialist reviews all Affirmative Housing Marketing Plans for new projects that include affordable units and annually monitors the compliance of Chapter 40B homeownership projects and Local Action Units (LAUs). She is also responsible for coordinating any refinancing or resales of affordable homeownership units as part of several projects, ensuring compliance with all affordability requirements, including affirmative outreach.

The City of Waltham requires developers who offer affordable units through the special permit process to contract with an approved lottery consultant to ensure that affirmative marketing procedures are in place. These procedures include minority outreach and a fair lottery process to select renters or buyers. This process is approved through the MA DHCD. Waltham also requires a Minority Business Enterprise/Women's Business Enterprise (MBE/MWE) Report Form for each project as part of HOME and CDBG regulatory agreements. The City will continue to encourage the inclusion of minority and women owned enterprises in HOME and CDBG funded activities, consistent with 24 CFR 92.350.

Watertown has a Capital Improvements Policy (2015) that is consistent with that of the HOME Consortium and the Department of Housing and Community Development. All the 11 remaining legacy HOME-assisted American Dream Downpayment Assistance Loans have a recapture provision which is consistent with that of the HOME Consortium. Many of these loans have

clauses that give the City the right of first refusal to purchase and require the seller to make a good-faith attempt to find an income-eligible buyer. In the latter case, City staff meet with the seller to ensure that they work with a firm or nonprofit (such as MetroWest Collaborative Development) to market the unit in a manner consistent with fair housing requirements. Also, in the few cases where the Affordable Housing Restriction does not mandate an attempt to market the unit to an income-eligible buyer, the City has an increase recapture percentage, to recover additional monies from a market rate sale. All monies recaptured are returned to the West Metro HOME Consortium as program income.

Data on the amount and use of program income for projects, including the number of projects and owner and tenant characteristics

Each community in the Consortium has exclusive use of their program income for projects within their community. Some circumstances have led to communities relinquishing program income funds which are then made available consortium wide and allocated through an RFP process.

In FY23, the Consortium received \$31,200.60 which \$7,100.60 was recorded as PI (\$25,000.00 was received as HP, recaptured homebuyer loan program income, which is not eligible for PA conversion). No PA subfunds were created from the total PI receipts in FY23. Per the Mutual Cooperation Agreement and FY23 Subrecipient Agreements, 70% of the subfunded PA funds are retained by the community that originated the program income; 30% of the subfunded PA funds will go to support Consortium Administration.

Program income was utilized for the following projects and programs during FY23:

- HM22 Bedford TBRA Program, \$1,952.00 in program income
- Newton: 2Life's Coleman House Project, \$57,376.10 in program income
- Newton: 2Life's Golda Meir House Expansion, \$18,102.40 in program income
- HM20-22 Waltham TBRA Program, \$55,442.00 in program income
- HM22 Wayland TBRA Program, \$3,850 in program income
- HM21-23 Framingham TBRA Program, \$122,861.73 in program income

Separately, the IDIS system requires that program income be expended as it is received and replace entitlement funding for the project. Please refer to the following table showing these detailed expenditures.

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

91.320(j)

Many communities within the WestMetro HOME Consortium actively foster the preservation of existing affordable housing, including through HOME assisted rehabilitation of state-owned public housing and the implementation of Tenant Based Rental Assistance programs. HOME funds were also used to support projects with Low-Income Housing Tax Credits in Newton. Framingham, Waltham, Brookline and Newton utilize CDBG funding to assist in rehabilitation and capital improvements of affordable housing properties.

Many other actions that communities are taking to foster affordable housing production can be found in Section CR-35: Public Housing.

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CR-60 Subrecipients Awards

| Project | FY23 ESG Award |
|--|-----------------------|
| Middlesex Human Service Agency | |
| Emergency Shelter Operations | \$8,050.00 |
| Brookline Community Mental Health Center | |
| Homelessness Prevention | \$27,235.00 |
| Rapid Re-housing | \$26,410.00 |
| Community Day Center of Waltham – Shelter Services | \$38,650.00 |
| REACH Beyond Domestic Violence | |
| Emergency Shelter Operations | \$22,140.00 |
| The Second Step - Emergency Shelter Operations | \$30,195.00 |
| ESG Administration | \$12,379.00 |

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1. Recipient Information—All Recipients Complete

Basic Grant Information

| | |
|---|------------|
| Recipient Name | NEWTON |
| Organizational DUNS Number | 076576826 |
| EIN/TIN Number | 046001404 |
| Identify the Field Office | BOSTON |
| Identify CoC(s) in which the recipient or subrecipient(s) will provide ESG assistance | Boston CoC |

ESG Contact Name

| | |
|-------------|--------------------------------------|
| Prefix | |
| First Name | NIKA |
| Middle Name | 0 |
| Last Name | SANDAL |
| Suffix | 0 |
| Title | Senior Community Development Manager |

ESG Contact Address

| | |
|------------------|--------------------------|
| Street Address 1 | 1000 Commonwealth Avenue |
| Street Address 2 | 0 |
| City | Newton |
| State | MA |
| ZIP Code | 02459- |
| Phone Number | 6177961146 |
| Extension | 0 |
| Fax Number | 6177961142 |
| Email Address | nsandal@newtonma.gov |

ESG Secondary Contact

| | |
|---------------|-------------------------|
| Prefix | |
| First Name | SHAYLYN |
| Last Name | DAVIS -IANNACO |
| Suffix | 0 |
| Title | Housing Program Manager |
| Phone Number | 6177961125 |
| Extension | 0 |
| Email Address | sdavis@newtonma.gov |

2. Reporting Period—All Recipients Complete

Program Year Start Date 07/01/2022
Program Year End Date 06/30/2023

3a. Subrecipient Form – Complete one form for each subrecipient

Subrecipient or Contractor Name: NEWTON
City: Newton Centre
State: MA
Zip Code: 02459, 1449
DUNS Number: 076576826
Is subrecipient a victim services provider: N
Subrecipient Organization Type: Unit of Government
ESG Subgrant or Contract Award Amount: 12,379.00

Subrecipient or Contractor Name: BROOKLINE COMMUNITY MENTAL HEALTH CENTER
City: Brookline
State: MA
Zip Code: 02445, 4445
DUNS Number: 097444186
Is subrecipient a victim services provider: N
Subrecipient Organization Type: Other Non-Profit Organization
ESG Subgrant or Contract Award Amount: \$53,645

Subrecipient or Contractor Name: Middlesex Human Service Agency, Inc.
City: Waltham
State: MA
Zip Code: 02453, 8509
DUNS Number: 170557474
Is subrecipient a victim services provider: N
Subrecipient Organization Type: Other Non-Profit Organization
ESG Subgrant or Contract Award Amount: \$8,050

Subrecipient or Contractor Name: REACH Beyond Domestic Violence, Inc.

City: Waltham

State: MA

Zip Code: 02454, 0024

DUNS Number: 781777412

Is subrecipient a victim services provider: Y

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: \$22,140

Subrecipient or Contractor Name: The Second Step

City: Newton

State: MA

Zip Code: 02460, 0002

DUNS Number: 028016942

Is subrecipient a victim services provider: Y

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: \$30,195.00

Subrecipient or Contractor Name: Community Day Center of Waltham, Inc.

City: Waltham

State: MA

Zip Code: 02454, 1066

DUNS Number: 791377612

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: \$38,650.00

CR-70 – ESG 91.520(g) - Assistance Provided and Outcomes

10. Shelter Utilization

| | |
|---------------------------------------|-------|
| Number of New Units - Rehabbed | 0 |
| Number of New Units - Conversion | 0 |
| Total Number of bed-nights available* | 8,751 |
| Total Number of bed-nights provided* | 7,866 |
| Capacity Utilization | 89% |

Table 11 – Shelter Capacity

**Due to COVID-19, many shelters were forced to decongregate and reduce the number of available beds in order to adhere to CDC's safety guidelines for social distancing. This is reflected in the data above and as a result, there was a lower utilization percentage.*

11. Project Outcomes Data measured under the performance standards developed in consultation with the CoC(s)

In conjunction with a review committee comprised of representatives from the Newton Department of Health and Human Services, City of Waltham, BoS CoC, and BNWW CoC homeless providers (non-ESG subrecipients), the City's Housing and Community Development Division review and evaluate responses to the Request for Proposals for ESG funding. Proposals are ranked based on the project's staff capacity, proposed outcomes, past performances, target population, and the most pressing needs in the region. Projects are funded on their successful operation and ability to promote housing stabilization.