

# FY19 (FFY18) ANNUAL ACTION PLAN

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

JULY 1, 2018 – JUNE 30, 2019

*For resubmission to the Department of Housing and Urban Development  
September, 2018*

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## Executive Summary

### AP-05 Executive Summary - 91.200(c), 91.220(b)

#### 1. Introduce and summarize the objectives and outcomes identified in the Plan

The FY19 (FFY 2018) Annual Action Plan represents the fourth year of the FY16-20 Consolidated Plan for the City of Newton's Community Development Block Grant (CDBG) and Emergency Solutions Grant (ESG) programs and for the WestMetro HOME Consortium HOME Investment Partnerships (HOME) programs.

The Consolidated Plan was prepared by Housing and Community Development Division (the Division) staff to describe the use of federal resources for housing and community development activities in Newton and housing activities in the twelve other HOME consortium communities – the towns of Bedford, Belmont, Brookline, Concord, Lexington, Natick, Needham, Sudbury, Watertown, and Wayland and the cities of Framingham and Waltham. The FY19 (FFY18) Annual Action Plan, which is the result of citizen-driven collaborative planning processes, details how the City of Newton and the members of the WestMetro HOME Consortium will allocate the CDBG, ESG and HOME federal funds for the period of July 1, 2018 through June 30, 2019.

#### **FY19 (FFY18) Federal Funding Amounts**

Community Development Block Grant (CDBG)	\$1,918,213.00
HOME Investment Partnerships Program*	\$1,597,353.00
Emergency Shelter Grant	\$156,262.00
Total	\$3,671,828.00

*\*HOME funds are apportioned among the 13 members of the WestMetro HOME Consortium*

#### **Community Development Block Grant funds**

The City has allocated CDBG funding to four general categories: Housing/Homelessness, Human Services/Public Services, Architectural Access, and Program Administration. These categories are funded based on the priorities and needs detailed in the FY16-20 Consolidated Plan.

#### *Housing/Homelessness*

The majority of funds (approximately 59.5 percent) will be allocated to Affordable Housing/Homelessness projects to be identified during the FY19 program year. This funding will be used to facilitate housing rehabilitation, site acquisition, and development of units for low- and moderate-income households.

### *Human Services/Public Services*

The Human Service Grants will fund 15 public service agencies and organizations during FY19. These programs directly benefit low-to-moderate income residents and will provide a critical network of supports to assist in moving vulnerable individuals and families out of poverty. The City intends to allocate 15 percent of CDBG funds, the maximum allowed by regulation.

### *Architectural Access*

Five and half percent of CDBG funds will be directed towards architectural access projects this year. These projects that enhance accessibility for persons with disabilities can be completed city-wide, without geographic restriction. In FY19 (FFY18), access funds will be used to install an ADA accessible bathroom on the first floor of City Hall.

### *Program Administration*

Staff intends to allocate the maximum allowable amount of 20 percent for program administration.

### **HOME Investment Partnership funds**

Consortium communities have individual goals related to the construction and rehabilitation of rental housing, as well as the provision of rental and downpayment assistance. Newton will utilize FY19 (FFY18) HOME funds for the creation of affordable rental housing units.

### **Emergency Shelter Grant and McKinney-Vento funds**

Emergency Solutions Grant (ESG) funds are awarded to local providers through a competitive Request for Proposals (RFP), providing shelter operations/services, homelessness prevention, and rapid rehousing services throughout the Brookline-Newton-Waltham-Watertown region. Staff released the FY19 (FFY18) RFP on January 24, 2018, alongside the Human Service RFP, to allow for a more timely identification of projects for the Action Plan and the execution of programs parallel to the start of the fiscal year. The FY19 ESG allocation will support 8 projects across 5 sub-grantee agencies.

The Balance of State (BoS), under the supervision of the Department of Housing and Community Development, administers McKinney-Vento funds for the former BNWW CoC communities. The Brookline-Newton-Waltham-Watertown (BNWW) Continuum of Care (CoC), previously lead by the City of Newton, merged with the Massachusetts Balance of State in December of 2016. HUD awarded the BoS a total of \$12,777,016 in FFY17 CoC funding, an almost 8% increase from the prior year. This is in part due to the recent merger of the BNWW CoC with the BoS CoC. Within the former BNWW CoC, \$1,360,000 in funding was awarded to Pine Street Inn, Vinfen, The Second Step, Advocates, Inc., Brookline Community Mental Health Center and Brookline Housing

Authority across 12 projects to continue implementation of regional emergency shelter, transitional, and permanent supportive housing programs.

## **2. Evaluation of past performance**

Following the close of the fiscal year, the City of Newton submits the Consolidated Annual Performance Evaluation Report (CAPER) to HUD on behalf of the City's CDBG and ESG programs, and the WestMetro HOME Consortium's HOME programs. This report describes, in detail, the expenditures and accomplishments of the prior year, and evaluates the progress the communities made in advancing the priorities identified in that year's Annual Action Plan.

The most recent draft Consolidated Annual Performance and Evaluation Report (CAPER) was posted to the City's website on September 20, 2017. In accordance with the Citizen Participation Plan, the CAPER was presented by Newton staff to the Planning and Development Board at a public hearing. For the FY17 (FFY16) CAPER, this hearing took place on October 2, at a special meeting of the Planning and Development Board. The presentation of the CAPER, initiated a 15-day comment period, after which the report was reviewed and certified by the Executive Office and submitted to HUD. The FY17 (FFY16) CAPER was submitted on October 31, 2017. A public notice of the hearing and subsequent comment period, was published in all of the Consortium communities' newspapers, and announced in the City's digital Friday Report. The public notice and report was made available on the City's webpage and in the Housing and Community Development Division ten days in advance of the meeting.

## **3. Summary of Citizen Participation Process and consultation process**

The draft FY19 Annual Action Plan was available for public review on Monday, April 30, 2018, in advance of the public hearing held by the Planning and Development Board on Monday, May 7, 2018. The Planning and Development Board voted to adopt the FY19 Annual Action Plan as presented, and then forward the Plan to the City Council and Mayor for final approval and submission. The comment period was held through Tuesday, June 5, 2018. The draft Plan was also presented to the Zoning and Planning (ZAP) Committee of the Newton City Council on Monday, May 14, 2018 and May 29, 2018. The ZAP Committee voted unanimously to recommend City Council approval of the FY19 Annual Action Plan. The City did not receive any written comments concerning the FY19 Annual Action Plan.

Please see the appendix to review the Citizen Participation Plan. Please also see the consultation and participation sections of this plan.

**4. Summary of public comments**

The City did not receive any written comments regarding the FY19 Annual Action Plan.

**5. Summary of comments or views not accepted and the reasons for not accepting them**

The City did not receive any written comments regarding the FY19 Annual Action Plan.

## **PR-05 Lead & Responsible Agencies - 91.200(b)**

### **1. Agency/entity responsible for preparing/administering the Consolidated Plan**

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

<b>Agency Role</b>	<b>Name</b>	<b>Department/Agency</b>
Lead Agency	City of Newton, MA	Housing and Community Development Division
CDBG Administrator	City of Newton, MA	Housing and Community Development Division
HOME Administrator	City of Newton, MA	Housing and Community Development Division
ESG Administrator	City of Newton, MA	Housing and Community Development Division

### **2. Introductory Narrative**

The Housing and Community Development Division (the Division) of the City of Newton's Department of Planning and Development serves as the lead agency responsible for the preparation and implementation of the Five-Year Consolidated Plan and respective Annual Action Plans. In addition to operating as the lead agency for the City's CDBG and ESG consolidated planning process, the Division also serves as the lead entity for the HOME Investment Partnerships Program (HOME) on behalf of the WestMetro HOME Consortium. The Consortium is comprised of the towns of Bedford, Belmont, Brookline, Concord, Lexington, Natick, Needham, Sudbury, Watertown, and Wayland, and the cities of Framingham, Newton and Waltham.

### **3. Consolidated Plan Public Contact Information**

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## **AP-10 Consultation - 91.100, 91.200(b), 91.215(l)**

- 1. Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).**

The City of Newton Housing and Community Development Division (the Division) of the Department of Planning and Development works collaboratively with municipalities, city departments, housing providers, and planning, human service and homelessness agencies throughout the community and region. These joint efforts seek to address community needs, inform investment decisions and ensure the provision of critical services like health care, crisis prevention, youth and elderly programming, child care, family support, affordable housing and employment opportunities for developmentally disabled persons. The Consolidated Planning process, citizen participation and ongoing coordination with the above-mentioned service providers improves communication, leverages resources, reduces duplication and produces more meaningful projects.

- 2. Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness.**

The Brookline-Newton-Waltham-Watertown (BNWW) Continuum of Care (CoC), previously lead by the City of Newton, merged with the Massachusetts Balance of State in December of 2016. The Balance of State (BoS), under the supervision of the Department of Housing and Community Development, implements the continuum's homelessness strategy across 80 member communities. This encompasses the administration of federal and state resources, submission of the Consolidated Application for McKinney-Vento funds, completion of regional needs assessments and supervision of projects addressing homelessness assistance and prevention.

During FY19 (FFY18), the BoS will facilitate a BNWW area needs assessment to get feedback from local providers, direct care workers and constituents regarding housing and homeless needs. The initiative will culminate in a report that can complement ongoing planning efforts.

HUD awarded the BoS a total of \$12,777,016 in FFY17 CoC funding, nearly an 8% increase from the prior year. While in part due to combined resources with the former BNWW CoC, the award also increases capacity for Permanent Supportive Housing (PSH) by 47 people. Within the former BNWW CoC, \$1,360,000 in funding was awarded to Pine Street Inn, Vinfen, The Second Step, Advocates, Inc., Brookline Community Mental Health Center and Brookline Housing Authority



across 12 projects to continue implementation of regional emergency shelter, transitional, and permanent supportive housing programs.

The BoS, in coordination with several agencies from former BNWW CoC, completed the 2018 Point-in-Time (PIT) Count on January 31, 2018. A total of 1,119 households and 2,296 homeless persons were counted throughout the entire BOS service area. Of those, 185 households and 404 homeless persons were counted in the Brookline-Newton-Waltham-Watertown geography.

**3. Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards for and evaluate outcomes of projects and activities assisted by ESG funds, and develop funding, policies and procedures for the operation and administration of HMIS**

The City coordinates with the BoS CoC concerning projects and activities, performance standards, funding priorities, Coordinated Entry and policies and procedures for the operation and administration of HMIS and ESG. Division staff consulted with the former BNWW CoC local providers and BOS representatives on January 18, 2018 to finalize FY19 (FFY18) ESG funding priorities across its emergency shelter, street outreach, homelessness prevention, and rapid re-housing programs. Last year the Division streamlined planning processes, deciding to release the ESG RFP alongside the Human Service RFP; this year's RFPs were available on January 24, 2018.

**4. Agencies, groups, organizations and others who participated in the process and consultations**

Division staff and the Consortium communities consulted with relevant City departments, local and regional organizations, and housing and other social service agencies throughout the development of the FY19 (FFY18) Annual Action Plan; included in this collaboration were the City of Newton Fair Housing Committee, the Commission on Disability, and the Balance of State Continuum of Care. Division staff also heard feedback from human service provider and homelessness service provider agencies at the Needs Assessment and Strategic Plan events during the drafting of the FY16-20 Consolidated Plan. This FY19 (FFY18) Action Plan continues to draw on the needs assessment and outreach completed during the 18-month consolidated planning process.

The draft FY19 Annual Action Plan was available for public review on Monday, April 30, 2018, in advance of the public hearing held by the Planning and Development Board on Monday, May 7, 2018. The Planning and Development Board voted to adopt the FY19 Annual Action Plan as presented, and then forward the Plan to the City Council and Mayor for final approval and submission. The comment period was held through Tuesday, June 5, 2018. The draft Plan was

also presented to the Zoning and Planning (ZAP) Committee of the Newton City Council on Monday, May 14, 2018 and Monday, May 29, 2018. The ZAP Committee voted unanimously to recommend City Council approval of the FY19 Annual Action Plan. The City did not receive any written comments concerning the FY19 Annual Action Plan.

Please see sheet AP-10: Consultation at the end of this section.

**5. Identify any Agency Types not consulted and provide rationale for not consulting**

Staff attempted to contact and consult with all agencies and individuals involved in providing affordable housing units, supportive services, and infrastructure improvements in the City of Newton and throughout the Consortium. No one was purposefully excluded from contributing or commenting on the Annual Action Plan.

**Describe other local/regional/state/federal planning efforts considered when preparing the Plan**

Please see sheet AP-10: Other Plans Considered at the end of this section.

## **AP-12 Participation - 91.401, 91.105, 91.200(c)**

### **1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting**

During the Consolidated Planning process, Division staff employed a number of methods to solicit citizen and agency input, including nine Needs Assessment presentation and discussion events, a Needs Assessment data presentation, and a meeting that summarized the input gathered during the Needs Assessment in May and June of 2014. In addition, Division staff created an online and paper survey to provide another resource for people to share their input regarding needs in the community, and how they might prioritize those needs. Additionally, in response to the public comments received during the Needs Assessment, the Division staff put an emphasis on gathering the input of low- to moderate-income people, current and potential beneficiaries of the CDBG, ESG, and HOME programs. During the 18 months of outreach, staff went to a number of events to spread the word about the Consolidated Plan and seek public input, including Nonantum Village Day, Newton Veteran's Service Center, and held a focus group with youth at the YMCA Teen Center. In addition, Division staff encouraged survey input from those who did not feel comfortable participating in a focus group, and received surveys from clients of The Second Step, Riverside Community Care, Family Access, JCHE, and others. Division staff also met with nine citizen advisory committees to share various aspects of the Consolidated Plan and receive input from members. Much of the data and information collected during this period was incorporated into the FY19 (FFY18) Plan.

In addition to the comprehensive collection of data, staff also discussed the Annual Action Plan at various boards and commissions meetings throughout January and February, including the following: the Fair Housing Committee; Newton Commission on Disability and the Brookline-Newton-Waltham-Watertown Homelessness Continuum of Care. In accordance with HUD guidance and the City's Citizen Participation Plan, a public hearing was held for a review of the Plan by the City's Planning and Development Board on May 7, 2018. An accessible draft of the document was made available on the City's website a week in advance of the hearing and copies of the Annual Action Plan were available in other languages upon request.

In addition, notice of the draft Annual Action Plan'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 Newton TAB, as well as in the newspapers of the twelve other WestMetro HOME Consortium communities during the week of April 22, 2018. The notice provided contact information for the City's ADA Coordinator, and telecommunications relay

service, for anyone that seeks to request a reasonable accommodation. The City did not receive any written comments concerning the Annual Action Plan.

### *Consortium Communities*

The Towns of Bedford, Concord, Lexington, and Sudbury use public hearings at the Board of Selectmen meetings when broad public input is needed and/or public hearings are required. The local Boards (Bedford Municipal Affordable Housing Trust, Bedford Housing Partnership, Lexington Housing Partnership, and Sudbury Housing Trust) hold monthly meetings to review and deliberate on all proposed or ongoing affordable housing projects.

In Brookline, the Housing Division staffs the Brookline Housing Advisory Board (HAB), which holds monthly meetings to review all affordable housing projects being undertaken or considered by the Town. All final funding commitments for affordable housing projects are approved by the Board of Selectmen, which act on recommendations from the HAB and hold public hearings for public input. Content related to the FY19 (FFY18) Plan was discussed at the Housing Advisory Board meeting on February 27, 2018. All HAB meetings are open to the public and advertised via the Town's website and blog, to all interested parties, including all Town Meeting members.

On January 1, 2018, Framingham transitioned from a town to a city. The transition eliminated the Town Meeting form of government but not the public participation process required of HUD grant recipients. As a result, the Community Development Department maintained its public participation process, issuing invitations to stakeholders using outreach outlets that included social media, newspapers, newsletters, email and other forums. Community outreach included the CAPER public hearing on September 14, 2017; a needs assessment hearing on November 30, 2017; a meeting by the Community Development Committee to evaluate proposals received for CDBG funds; and a February 1, 2018 meeting to allocate funds. Citizen input, solicited through an electronic survey last year, continued to inform the process. Paper copies of the survey were distributed to libraries, town departments, public housing sites, area nonprofits and other related sites.

In May of 2016, the Town of Natick embarked on Natick 2030+, a two-year process to prepare a comprehensive master plan for Natick that recommends actions to achieve the town's desired vision for its physical environment over the next 20 years. Housing is a major component of this plan. In multiple public engagement events held to date, residents particularly support diversification of the Town's housing stock, development of mid-rise multi-family dwellings (under six stories), development of more barrier-free dwellings and a wider variety of housing types in town that can accommodate a broad array of inhabitants in various life stages.

The City of Waltham Planning Department held a public meeting on January 16, 2018, to gather input on the FY19 (FFY18) Annual Action Plan. Topics discussed included housing and community development needs and proposed use of funds for the upcoming year. Two other public meetings will be held after applications for funding are accepted.

In Watertown, the Watertown Housing Partnership serves as the Town's policy body, whose volunteer members are appointed by the town manager to oversee the development and preservation of affordable housing in Watertown. The Partnership uses email to announce its meetings, as well as agenda postings. The Partnership approved the Watertown components of the FY19 (FFY18) Annual Action Plan on February 20, 2018.

Please see sheet [AP-12: Citizen Participation](#) at the end of this section for detailed information on outreach.

## Expected Resources

### AP-15 Expected Resources - 91.420(b), 91.220(c)(1,2)

#### 1. Introduction

The City of Newton anticipates receiving \$3,671,828.00 in CDBG, HOME and ESG funds, plus an additional \$125,000 in program income, during the July 1, 2018- June 30, 2019 program year. The \$543,280.55, in CDBG and HOME program income, received by the City in FY18 (FFY17) will also be used as a resource in FY19 (FFY18). Investments are targeted to a myriad of community needs and priorities identified in the FY16-20 Consolidated Plan and include the development and preservation of affordable housing, homelessness assistance and prevention, human services, architectural access and program administration. To maximize the impact of these HUD entitlement funds, the City strategically leverages additional funds and partnerships whenever possible.

See [AP-15: Anticipated Resources](#) at the end of this section.

#### 2. Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

The City will use federal funds to leverage additional resources in several ways. With respect to affordable housing projects, federal HOME and CDBG funds will be complemented with City-controlled Community Preservation Act (CPA) funding to produce and preserve affordable units wherever possible. CPA funding provides the flexibility to produce mixed-income developments, as this funding source can be used to support households earning up to 99% of AMI. Available funds collected as a result of the City's Inclusionary Zoning Ordinance can further supplement these resources. Inclusionary Zoning (IZ) funds are collected from developers of multi-family housing projects in lieu of providing affordable units on site. During the needs assessment meetings held in preparation for developing the FY16-20 Consolidated Plan, many participants, particularly older adults, expressed the need for more mixed-income housing opportunities in the City. These developments should have market-rate, moderately-priced and restricted affordable units and be located in village centers or close to transportation and amenities. A combination of public investments using CDBG, HOME, CPA and IZ funding, in addition to other state investments (such as tax credits etc.) and private financing, should facilitate affordable housing development in Newton.

Relative to CDBG human services, and ESG, respondents to the City's request for proposals (RFP)

must detail complete program costs and resources to be utilized in conjunction with the CDBG funds. Leveraged funds include fundraised dollars, McKinney-Vento funds, housing vouchers, community foundations and trusts, and state grants allocations.

HOME communities support housing projects by leveraging HOME funds with state, Community Preservation Act, Inclusionary Zoning and other town funds. Communities additionally report forgone taxes from HOME match-eligible affordable housing units and state and local tenant based rental assistance program funds as HOME match contributions.

In FY19 (FFY18), the Town of Brookline plans to commit \$477,411 in HOME funds through a combination of FY18, FY19 allocations and program income funds to assist Jewish Community Housing for the Elderly (JCHE) in developing a 62-unit affordable senior housing project to be located in Coolidge Corner. The HOME funds are part of an overall town commitment of \$2.5 million to the project. Additional funding from the Town will come from its local Housing Trust Fund as well as CDBG entitlement funds. Currently JCHE is seeking state subsidies and Low-Income Housing Tax credits from the State's Department of Housing and Community Development as well as private debt, in order to complete this \$25 million project.

In the Town of Concord, the \$498,873 in HOME funds dedicated to the Peter Bulkeley Terrace project were used as leverage to raise \$282,145 in additional funding from the Town of Concord, Concord CPA, and DHCD. By leveraging these HOME funds, Concord has more than doubled the funding available for this project. The project was completed in FY18 (FFY17).

In the Town of Lexington, the \$143,400 in HOME funds dedicated to the Keeler Farm project were used as leverage to raise \$55,600 in additional funding from the Lexington CPA, surpassing the match requirement of \$49,750. The project was completed in FY18 (FFY17).

In FY17 (FFY16), the Town of Natick, through its Affordable Housing Trust, began accessing Special Permit Mitigation funds to support the development of two affordable dwellings at 299 Bacon Street. The Trust made its first request to Town Meeting for dedicated funds to develop affordable housing in the spring of 2017, and received an allocation of \$78,000. The Trust will make a successive request from Town Meeting in the spring of 2018, with the goal of making such requests a regular part of the Town's budget process.

In FY18 (FFY17) the City of Waltham expanded its TBRA Security Deposit program to provide full rental assistance to chronic homeless and at-risk elderly that have been identified and referred by the Waltham Police Homeless Coalition, the Community Day Center, MHSA Bristol Shelters and the Council on Aging. A total of \$611,598.31 in HOME funds have been expended through the TBRA program since FY17 (FFY16). These funds provided assistance to 78 low-income

households. In FY19 (FFY18) the program will leverage \$100,000 in Community Preservation (CPA) funds. The Waltham Housing Authority was awarded 2.3 million dollars in CPA funds for a local housing voucher program which is estimated to serve 50 households for three years. The City's TBRA program will work in tandem with the WHA's housing voucher program to provide security deposits to these 50 households.

As a result of the November 2016 election, Watertown adopted the Community Preservation Act (CPA). The Town enacted a two percent surcharge, and has created the property assessment and taxation infrastructure to collect and sequester these funds. The CPA funds can be used in the future to leverage federal HOME funds.

**3. If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan**

Several affordable housing projects are underway in the City of Newton that will help to further leverage those goals identified with federal funds and address those needs outlined in the FY16-FY20 Consolidated Plan.

The City of Newton is actively helping to facilitate the creation of nine to twelve units of non-age-restricted housing for chronically homeless adults with disabilities. An underutilized, 16,900 square foot city parcel, located at 160 R Stanton Avenue, was one of those selected specifically for this purpose. Jewish Community Housing for the Elderly (JCHE) was chosen as the housing developer through the City's public procurement process. JCHE is now advancing development efforts and has taken steps to engage the neighborhood and determine financing options, which may include a combination of Low Income Housing Tax Credits (LIHTC), DHCD Affordable Housing Trust, Innovation and Stabilization Funds. Neighborhood meetings have been held February 15, 2018 and May 7, 2018.

Land owned by the City of Newton at 70 Crescent Street, containing approximately 60,000 square feet, is the site of a future mixed-income rental project that will include a total of eight housing units and the expansion of the adjacent Reverend Ford Playground. Two of the rental units will be affordable to households earning 60% of the Area Median Income (AMI) and three of the units will be affordable to households earning 80% of the AMI. The parcel will be reviewed through the municipal site approval process in lieu of a special permit. The City is determining financing options.

In 2013, a 12.8 acre parcel was conveyed to the Concord Housing Development Corporation by the Commonwealth of Massachusetts to be used solely for open space and affordable housing. Concord plans to develop Junction Village, an affordable assisted living facility, on this site. The development received its Comprehensive Permit and a funding application has been submitted to DHCD.



**AP-15 Anticipated Resources for City of Newton & WestMetro HOME Consortium for FY19**

Program	Source	Use of Funds	Expected Amount Available FY19 (FFY18)		Amount Expected to be Available the Remainder of the ConPlan	Narrative Description
CDBG	public - federal	Acquisition/Mortgage Refinance for Housing Development, Administration & Planning, Housing Rehabilitation, Public Facilities Improvements, Architectural Access Improvements, Public Services	Annual Allocation (\$)	\$1,918,213.00	\$1,918,213.00	Please see word document for narrative.
			Program Income (\$)	\$139,750.00		
			Prior Year Resource(s)			
			Total(\$)	\$2,057,963.00		
HOME	public - federal	Homebuyer Assistance, Creation and Rehabilitation of Rental Units and Tenant-Based Rental Assistance. CHDO Operating and Administrative Funds.	Annual Allocation (\$)	\$1,597,353.00	\$1,597,353.00	HOME PI is \$3,313.05, HOME IU is \$308,268.00 and HOME HP is \$470,171.64 as of 5.15.18.
			Program Income (\$)	\$509,780.55		
			Prior Year Resource(s)	\$1,377,116.18		
			Total(\$)	\$3,484,249.73		
ESG	public - federal	Financial Assistance, Overnight Shelter, Rapid Re-housing, Rental Assistance, Homelessness Prevention Services, Transitional Housing, Street Outreach	Annual Allocation (\$)	\$156,262.00	\$156,262.00	Please see word document for narrative.
			Program Income (\$)			
			Prior Year Resource(s)			
			Total(\$)	\$156,262.00		

## **Annual Goals and Objectives**

### **AP-20 Annual Goals and Objectives - 91.420, 91.220(c)(3)&(e)**

#### **1. Goals Summary Information**

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 FY19 (FFY18) Annual Action Plan identifies eight goals for the City of Newton.

##### *Goal 1: Production of affordable housing*

In FY19 (FFY18), CDBG and HOME funding allocated to the City of Newton will continue to be used for a variety of programs and activities to preserve and expand affordable opportunities across the City. In alignment with the FY16-FY20 Consolidated Plan, the Division will seek to fund affordable housing projects within mixed-income developments near transit and village centers. They will also seek to identify projects that expand the stock of accessible and visitable housing. Through prior year CDBG and HOME funding, it is also anticipated that 9 units of affordable rental housing will be completed. The 83-85 West Street project, owned by the Housing Authority, includes the acquisition and rehabilitation of an existing duplex to create two units affordable to households earning 80% of the Area Median Income. The Division will also complete the close out of seven additional units created through acquisition, rehabilitation, and new construction at Myrtle Village. Two of these units will be HOME-assisted units. Inclusionary zoning and Chapter 40B Comprehensive Permit projects will create an additional 73 affordable rental units and two affordable homeownership units, leveraged with non-federal resources. Please see the appendix for additional information on these units.

Staff will continue to administer a Downpayment/Closing Cost Assistance program to support and expand sustainable homeownership among low- and moderate-income households in Newton. The program will target homeownership opportunities in new and existing deed restricted homeownership units. It is anticipated that three income eligible homebuyers will be assisted through the CDBG Downpayment/ Closing Cost Assistance program in FY19. The City intends to support up to two income-eligible homebuyers who will be purchasing the affordable units at 1521 Beacon Street (a 40B Comprehensive Permit project) and at least one income-eligible homebuyer who will be purchasing a home through the City's First-Time Homebuyer Resale Program.

*Goal 2: Rehabilitation of housing*

Staff will continue to market and administer the Housing Rehabilitation program (Rehabilitation program) on a rolling basis, which provides homeowners and qualifying nonprofit organizations with deferred payment loans for repairs and improvements aimed at addressing issues related to health, safety, and building code violations. In FY19 (FFY18), the Rehabilitation program will also be expanded to include existing accessory apartments and lodging houses that require repairs to ensure resident health, safety, and building code compliance. Expansion of the program was a direct result of the recent adoption of the City's Accessory Apartment Ordinance and the Lodging House Ordinance. Through FY19 and prior year funding, it is anticipated that approximately five units of homeowner housing will be rehabilitated through CDBG assistance.

*Goal 3: Provision of supportive services to the homeless and at-risk of homeless*

With respect to the Emergency Solutions Grant (ESG), \$156,262 was allocated through a competitive RFP process for local agencies to provide emergency shelter, supportive services, rapid rehousing, and homelessness prevention assistance to homeless and at-risk individuals and families. The City of Newton, Balance of State (BoS) CoC and the former BNWW providers balance consideration of the population's greatest needs in the immediate region and HUD's increased emphasis on funding rapid re-housing and homelessness prevention. During FY19 (FFY18), ESG funding will support 8 programs across 5 sub-grantees.

*Goal 4: Assistance to transition homeless individuals and families to permanent housing*

The Tenant-Based Rental Assistance (TBRA) program has traditionally assisted families at or below 60% of the AMI, with rental vouchers directed toward families experiencing homelessness whenever possible. In FY19 (FFY18), the City will continue to fund TBRA assistance for one household that was selected in FY16 (FFY15) and one household that was selected in FY17 (FFY16), for successful placement in rental homes. FY19 (FFY18) will be the third and final year of assistance for the TBRA households selected in FY16 (FFY15). The City will not issue a new voucher for FY19 (FFY18) as staff considers the extensive administrative undertaking of TBRA, limited available capacity and overall priorities. The Division may reevaluate this goal in the future.

*Goal 5: Creation of permanent and supportive housing for the homeless*

In FY17 (FFY16), the City of Newton released its city-wide housing strategy, *Newton Leads 2040 Housing Strategy* (Strategy), which established the goal of creating an additional 800 Subsidized Housing Inventory units in the City by 2021 through a number of targeted policies and action steps. The Strategy identified six sites that could potentially accommodate nine to twelve units of permanent supportive housing for chronically homeless individuals. In FY18, the City issued a

Request for Proposals for the development of non-age restricted permanent supportive housing for chronically homeless adults with disabilities at 160 R Stanton Avenue. Jewish Community Housing for the Elderly (JCHE) was selected as the developer and will continue to advance development efforts on this project in FY19. JCHE is advancing efforts to engage the neighborhood and determine financing options, which may include a combination of Low Income Housing Tax Credits (LIHTC), DHCD Affordable Housing Trust, Innovation and Stabilization Funds.

*Goal 6: Increase awareness of fair housing policies and practices*

Consistent with the 2015-2020 WestMetro HOME Consortium Regional Fair Housing Plan, the City, in conjunction with the Fair Housing Committee, will continue to collaborate to increase knowledge about fair housing laws and obligations, identify and address discriminatory actions, increase the capacity of the City and Consortium to affirmatively further fair housing and advance access to housing opportunity. City staff will continue to be trained on the fair housing obligations and will in turn develop and sponsor programs to educate elected officials, decision makers, and the general public about these obligations. The City, WestMetro HOME Consortium and FHC will also initiate development of the 2021-2025 Regional Analysis of Impediments, which in addition to the above measures, will involve conducting an updated Analysis of Impediments to Fair Housing Choice and outline meaningful goals and objectives to undertake in overcoming identified barriers.

*Goal 7: Provision of human services*

Human service grants will support 15 public service agencies and organizations during FY19 (FFY18). A total of \$321,230 was distributed through a competitive process held in conjunction with the ESG RFP. Selected programs cover a wide range of services that will address the needs of vulnerable populations parallel to the Brookings Institution's "Benchmarks for Success" model recently adopted and adapted by the City. These programs will directly benefit low-to-moderate income youth, families, persons with disabilities, and seniors, and assist in moving families out of poverty. An estimated 2,014 people will be served through the human service program over the next program year.

*Goal 8: Implementation of architectural accessibility improvements for persons with disabilities*

Five and a half percent of CDBG funds, \$105,000 will be allocated to the installation of an ADA accessible bathroom on the first floor of City Hall.

*HOME Consortium Goals*

The Consortium communities identified the creation of affordable housing, both ownership and rental, rehabilitation and tenant-based rental assistance, as goals for the FY19 (FFY18) program year.

Bedford will continue its Tenant Based Rental Assistance Program and plans to support four additional households in the upcoming year.

In FY19 Brookline's Trustman Apartment project will be complete, yielding 11 HOME-assisted units. The town committed HOME funds to the rehabilitation of the Trustman Apartments, a state funded housing authority development, in FY17 (FFY16). HOME funds will be committed in FY19 to assist with the development of new rental housing opportunities for extremely low-, low-, and moderate-income households. This project is being developed by the Jewish Community Housing for the Elderly and is expected to create 11 HOME units in FY20 (FFY19).

Concord plans to start a feasibility analysis for an affordable assisted living facility. The facility will include 83-units of new construction overall, 5 HOME assisted units. All units will be restricted. The development, Junction Village, has received its Comprehensive Permit and has applied to DHCD for funding. This is a new project.

The City of Framingham will assist 40 households through the Tenant-Based Rental Assistance program. This security deposit and first month's rent subsidizing program has provided needed relief to renters and the City is committed to continuing this effort in FY19 (FFY18). The City of Framingham sets a general target for housing development projects that it works to reach as partnerships are formed with local housing developers throughout the fiscal year.

The Town of Natick will provide ten households with assistance through the Town's Tenant-Based Rental Assistance (TBRA) program. This program uses HOME funds to cover one-time rental costs, such as security deposits, for eligible families and individuals.

Belmont, Needham and Lexington have no ongoing HOME projects. Sudbury is continuing to utilize HOME funds to repay Natick for funds borrowed to finance the Coolidge at Sudbury project.

Waltham will utilize HOME funds to provide security deposits to chronically homeless individuals and families as well as at-risk elderly households through the City's Tenant-Based Rental Assistance program. Waltham expects to assist 25 households in FY19 (FFY18) through this program.

Watertown does not have any pending HOME supported projects that will be completed in FY19 (FFY18) and will rely on its Inclusionary Zoning to create additional affordable units. The Town does not expect to utilize HOME funds for a Watertown based project in FY19 (FFY18).

In FY17 (FFY16), the Town of Wayland, through its Affordable Housing Trust, began accessing Special Permit Mitigation funds from the New Town Center Development to support the purchase of a single family home with five bedrooms at 11 Hammond Road in Cochituate Village.

The Trust is working with the various housing boards to create two additional housing units at this same location.

## **AP-35 Projects - 91.420, 91.220(d)**

### **1. Introduction**

During the fourth year of the 2016-2020 Consolidated Plan, funding will continue to address unmet community needs and continuing commitments to priority multi-year initiatives. Proposed projects and activities remain consistent with HUD priorities, seeking to primarily assist vulnerable low-to-moderate income residents through the creation and preservation of decent housing, suitable living environment and expanded economic opportunity.

See sheet [AP-35: Projects](#) at the end of this section.

### **2. Describe the reasons for allocation priorities and any obstacles to addressing underserved needs**

Division staff allocated CDBG funding to five general categories: Housing/Homelessness, Human Services/Public Services, Architectural Access, and Program Administration. These categories are funded based on the priorities and needs detailed in the FY16-20 Consolidated Plan.

#### **Housing/Homelessness**

The majority of funds (approximately 59.5 percent) will be allocated to Affordable Housing/Homelessness projects to be identified during the FY19 program year. This funding will be used to facilitate housing rehabilitation, site acquisition, and development of units for low- and moderate-income households.

#### **Human Services/Public Services**

The Human Service Grants will fund 15 public service agencies and organizations during FY19 (FFY18). These programs directly benefit low-to-moderate income residents, offering a critical network of supports to provide essential services for low-to-moderate income children, youth, families, adults, seniors and persons with disabilities and assist in moving vulnerable families out of poverty. The City intends to allocate 15 percent of CDBG funds, \$321,230, the maximum allowed by regulation.

#### **Architectural Access**

Five and a half percent (\$105,000) of the City's annual CDBG allocation will be directed to the installation of an ADA accessible bathroom on the first floor of City Hall.

#### **Program Administration**

The maximum allowable amount of 20 percent will be allocated toward program administration.

The FY19 (FFY18) CDBG allocation for the City of Newton is 10.5 percent more than the City's FY18 (FFY17) allocation. The HOME allocation also increased, by 37.6 percent, and the ESG

allocation decreased slightly (.04 percent) between FY18 (FFY17) and FFY19 (FFY18). Additional federal funds will be used to assist the greatest number of families and households possible, however, the primary obstacle to addressing underserved needs in the categories listed above continues to be limited funding. Neighborhood opposition to affordable housing projects presents an additional challenge to increasing housing opportunities for low-income households.

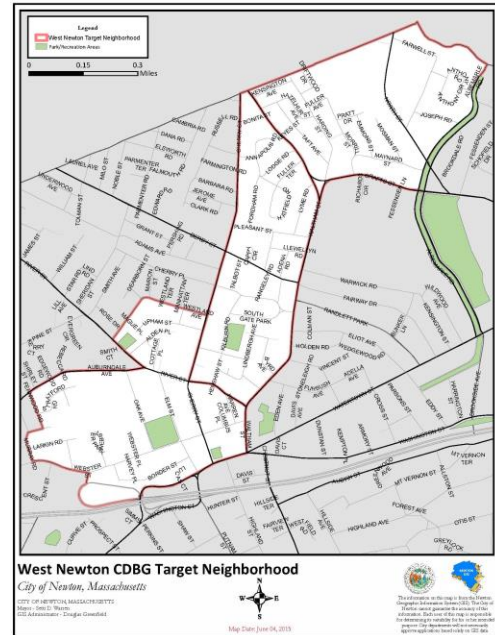


## AP-50 Geographic Distribution - 91.420, 91.220(f)

### 1. Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

As the Community Development Block Grant (CDBG) is intended to predominantly serve low- to moderate-income residents, CDBG funding is allocated to projects that are either within CDBG eligible areas or directly impact low-to-moderate income beneficiaries. The City of Newton has identified four “target neighborhoods” within which to allocate CDBG funding on an area basis: West Newton, Newtonville, Nonantum and Newton Corner. This designation is based on the geographic boundaries of the eligible census block groups that met or surpassed the required Low Moderate Income threshold as determined by HUD Low and Moderate Income Summary Data, computed from three year American Community Survey (ACS) data. Traditionally, block groups must be comprised of at least 51% of low- and moderate-income residents for a neighborhood to be eligible for area-benefit activities. This threshold, however, is reduced for Newton, because it contains only two block groups that meet that standard. HUD classifies Newton as an exception community, meaning that block groups are considered eligible for expenditures if comprised of greater than or equal to 30.68% low- and moderate-income residents.

Currently there are no priority “target neighborhood” improvements planned during FY19. The City anticipates increasing its investment in housing rehabilitation and development over the next program year to better address the ever escalating need for safe, decent and affordable housing. Affordable housing rehabilitation and development will directly benefit low-to-moderate income households, and accordingly, can be distributed city-wide. Approximately \$1,223,091 will be available to allocate on rolling basis toward FY19 affordable housing projects.



#### *Consortium Communities*

Community Development Department staff in the Town of Framingham use census tract information to determine whether to target a specific area of the community with HOME funds. With this strategy, HOME funds are designated for use in census tracts 383600.2, 383501.2, 383300.1, 383400.3, 383400.2, 383200.4, 383200.1, 383101.2, 383101.1, 383102.1, and 383102.2. These tracts house the highest number of low- and moderate-income residents.

No other Consortium communities identify target geographic areas.

## **2. Rationale for the priorities for allocating investments geographically**

Previously, the funding for neighborhood improvements operated on a six-year alternating rotation. Newton Corner and Nonantum each received funding once every three years, while Newtonville and West Newton each received funding once every six years. In the past year, division staff streamlined planning efforts by developing a CDBG Improvement Request For Proposal (RFP) to identify neighborhood improvement, accessibility, and public facility projects. The purpose was to prioritize CDBG Improvement projects based on their ability to efficiently address identified needs and their status as a shovel-ready project. However, given the increasing need for affordable housing, the City will be allocating additional funds toward housing rehabilitation and affordable housing development during the July 1, 2018 - June 30, 2019 program year. Any neighborhood improvement projects identified during this time will be dependent on the availability of funds and must go through the substantial amendment process.

See narrative above and section SP-10 in the Strategic Plan chapter of the FY16-20 Consolidated Plan for more information on the designation of the target neighborhoods, and see the Citizen Participation Plan in the appendix for more information.

## Affordable Housing

### AP-55 Affordable Housing - 91.420, 91.220(g)

#### 1. Introduction

In FY19 (FFY18), CBDG and HOME funding allocated to the City of Newton will continue to be used for a variety of programs and activities to preserve and expand affordable opportunities across the City. The Division seeks to identify projects that align with priority needs outlined in the FY16-FY20 Consolidated Plan and increase the stock of accessible and visitable housing. Inclusionary zoning and Chapter 40B Comprehensive Permit projects will also create an additional 73 affordable rental units and two affordable homeownership units, leveraged with non-federal resources. (Please see the appendix for additional information on these units).

The City will also continue to support the creation of nine to twelve units of non-age restricted permanent supportive housing for chronically homeless adults with disabilities. These units will be incorporated into the proposed expansion of the Jewish Community Housing for the Elderly's (JCHE) existing Golda Meir House, which already includes 199 units of affordable senior housing with extensive programming and services.

In September 2017, the City issued a Request for Proposals for the reuse of the City-owned water tower site on Stanton Avenue, which directly abuts the Golda Meir House. Prior to the issuance of the RFP, the City Council approved the disposition and rezoning of the property to facilitate affordable housing development for chronically homeless adults with disabilities. In October 2017, the City chose to move forward with JCHE's proposal and will sell this publicly owned land to JCHE in order to connect the old and new buildings into one vibrant affordable housing community.

Housing Division staff have played a crucial role in the progress of this project and will continue to oversee the development process on behalf of the City, particularly as it relates to ensuring the inclusion of the nine to twelve units for chronically homeless adults with disabilities. Community meetings have been held on February 15, 2018 and May 7, 2018. JCHE is expected to apply for a Chapter 40B Comprehensive Permit in the fall of 2018 and is currently in the process of determining their financing options.

In FY17 (FFY16), the City completed the *Newton Leads 2040 Housing Strategy (Strategy)*, which established the goal of creating an additional 800 Subsidized Housing Inventory units in the city by 2021, through a number of targeted policies and action steps. The Strategy identified possible locations for affordable housing (including the water tower site next to the Golda Meir House) and housing types appropriate for those locations, in addition to policies that can be

implemented to expand diverse housing choices in Newton. The City began implementing the Strategy in FY17 (FFY16) and will continue this work in FY19 (FFY18).

In FY19 (FFY18), the City will administer programs that were successful in FY18 (FFY17) as well as develop and administer new programs which support housing opportunities in Newton:

- The City will make CDBG and HOME funds available for the rehabilitation and creation of new affordable rental units. Projects will be identified in the FY19 program year. In addition, the City will work to strengthen its relationship with existing housing providers in order to support diverse housing choices in Newton.
- Staff will continue to market and administer the Housing Rehabilitation program (Rehabilitation program), which provides homeowners and qualifying nonprofit organizations with deferred payment loans for repairs and improvements aimed at addressing issues related to health, safety, and building code violations. The Division anticipates that five units will be rehabilitated in FY19 (FFY18). Over the past year, the City has expanded the allowable scope of work available through the Housing Rehabilitation Program for the Newton Housing Authority and other nonprofit housing organization projects in order to more comprehensively address critical repairs for health and human safety. Previously, allowable work was limited solely to accessibility improvements. In FY19 (FFY18), the City will consider expanding the Rehabilitation program to existing accessory apartments and existing lodging houses that require repairs to ensure resident health, safety, and building code compliance. Expansion of the program will be evaluated in conjunction with the recent adoption of the Accessory Apartment Ordinance and the Lodging House Ordinance.
- Staff will administer a downpayment/closing cost assistance program to support and expand sustainable homeownership among low- and moderate-income households in Newton. The program will target homeownership opportunities in new and existing deed restricted homeownership units. The City intends to support up to three first-time homebuyers.
- One new Chapter 40B Comprehensive Permit projects will be completed in FY19 (FFY18). This project includes an 8-unit mixed-income homeownership project, featuring 2 affordable homeownership units.
- In FY19 (FFY18), an 8-unit mixed-income rental project will be completed by the City (including 5 affordable units and 3 middle-income units). Supported through CPA and City funds, and identified as a priority action in the City's Housing Strategy, this project, 70

Crescent Street, represents the first time the City has developed housing on its own. The project will remain under the ownership and management of the City of Newton.

- In FY19 (FFY18), the City will continue to pursue amendments to its existing Inclusionary Zoning Ordinance to better leverage private development to support additional affordable housing in Newton.
- The City will continue with its Zoning Re-Design project, an effort to rewrite and redesign the City's entire Zoning Ordinance. 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.
- In FY19 (FFY18), the City will continue to fund Tenant-Based Rental Assistance (TBRA) for two families. However, the City will not issue a new TBRA vouchers during FY19 (FFY18).

#### *Consortium Communities*

The Town of Bedford plans to assist at least four households with HOME financial rental assistance in FY19. Bedford has other active affordable housing projects. The Town is assisting POAH (Preservation of Affordable Housing) with the preservation of 96 units of housing at Bedford Village with \$3,000,000 of Bedford CAP funds. This development was originally funded through the State's 13A program, and the affordability restriction is expiring in March of 2018. The project includes the change of ownership of 447 Concord Road in Bedford, a HOME-assisted development. The Town is also supporting the Coast Guard property, with the Pine Hills Crossing development, with overlay zoning for the March 2018 Town Meeting. Bedford has commissioned a Housing Strategic Study to review current data and discuss future goals and strategies. The Town currently has 977 affordable units, with 18.36% of its housing included in the Commonwealth's Subsidized Housing Inventory (SHI).

Though not HOME funded, the Town of Belmont anticipates 112 rental units with 10% affordable will begin to come online during FY19 (FFY18) at The Bradford, formerly Cushing Village.

In Brookline, a new project with a total of 62 new units of affordable rental senior housing will continue during FY19 (FFY18). This project begun in FY17 (FFY16) and it is expected that project closeout will occur in FY20 (FFY19), when it is fully occupied. The Town continues to process a number of 40B projects which will add additional affordable units to the Brookline's housing stock. In addition, the Town is working with owners of a large parcel in Coolidge Corner on a

mixed-use redevelopment that will contain a large number of residential units, including affordable units. It is anticipated that if approved, these projects will add hundreds of new units of housing over the next several years, with 15% to 25% of these projects being affordable to households earning less than 80% of Area Median Income. Finally, Brookline's Public Housing Authority will embark on a multi-year strategic preservation initiative that will rehabilitate and preserve its six federal housing developments through the HUD Rental Assistance Demonstration program, with state and local support.

The Town of Concord has a history of supporting efforts to establish and maintain affordable housing. The Town currently has 710 affordable units, with 10.3

6% of its housing included in the Commonwealth's Subsidized Housing Inventory (SHI). The Peter Bulkeley project was completed in FY18 (FFY17) and created four new units of senior housing. Concord expects to start feasibility planning for an affordable assisted living facility project that will include 83 units of new construction overall, and 5 HOME-assisted units. All units will be restricted. The development, Junction Village, has received its Comprehensive Permit and has applied to DHCD for funding. This is a new project.

In recent years, Framingham's Community Development Department committed to operating Tenant-Based Rental Assistance, as well as creating new affordable housing through local partnerships. Such efforts have culminated in the preservation of affordable housing in partnership with SMOC, which restricted 58 units on the subsidized housing inventory. The City will continue to promote development of new affordable units and rehabilitation of rental housing.

The Town of Lexington completed funding for the Keeler Farm project in FY18. Discussions with the Lexington Housing Authority have begun regarding future potential projects.

The Natick Affordable Housing Trust is using several previous years' HOME allocations to support renovation of the Coolidge House Congregate building which will be converted from 18 Single Room Occupancy units to 10 one-bedroom units, and will eventually be leased to the Massachusetts Department of Mental Health in FY18. In FY19, the Trust will fund a new Tenant Based Rental Assistance service offered by the Natick Service Council through their financial assistance program.

The Town of Needham approved three affordable rental developments that were permitted through the Chapter 40B comprehensive permit process, most through the State's Local Initiative Program otherwise known as the "friendly 40B" process. These projects included five affordable units that were mandated by special zoning for new independent living units as part of a Continuing Care Retirement Community developed by Wingate which are now all occupied.

Another 390 rental units were approved for the Second Avenue Residences (now called The Kendrick) development which is part of the redevelopment of a business area into mixed office, retail, residential and recreational uses. This project will include 98 affordable units and is currently being marketed for initial occupancy in the summer of 2018. The permitting of another large rental housing project, Modera Needham, will generate a total of 136 units, 34 of which are affordable. These units are also currently being marketed for initial occupancy in the summer of 2018. These projects put the Town at a 12.61% level of housing affordability.

The Town of Needham, through its Department of Public Health and Council on Aging, also received a grant from the Massachusetts Association of Health Boards for Healthy Aging through Healthy Community Design for an assessment of community conditions and barriers to senior-friendly housing and transit in Needham. This assessment recommended a number of measures for the Town to explore to help seniors age in place. The Town is currently pursuing several of these recommendations including the potential permitting for accessory dwelling units that will lend greater diversity and affordability to Needham's housing stock.

The City of Waltham Inclusionary Zoning Ordinance requires at least 10 percent of units in residential developments with 8 or more dwellings to be affordable to households at 80% of the Area Median Income. Recent developments, triggering this requirement, added a total of 83 affordable rental units to the Waltham subsidized housing inventory (SHI). Nineteen of the SHI units added are affordable elderly units developed by the City of Waltham.

Watertown will continue work to create the assessing, taxation financial infrastructure necessary to implement the Community Preservation Act, and to set up a CPA Committee. Strategy 2.2 of Watertown's 2014 Housing Production Plan recommends the Town "analyze industrial and Pleasant Street Corridor zoning districts to identify areas more appropriate for mixed use and/or multi-family development..." In 2015, the Town changed the zoning in the Pleasant Street Corridor, to incentivize mixed use. In 2017, one mixed use apartment project was approved in the Corridor by Special Permit, and another was under review.

The Town of Wayland will continue to make progress on efforts to sell River's Edge, a town-owned parcel on Route 20. The site represents an extraordinary opportunity in Wayland, with zoning in place to build 188 multi-family residential units in primarily three to four story buildings. The Wayland Planning Board sees this project as a unique opportunity to build attractive, higher density housing for which there is demand. The project also meets Commonwealth goals, including Smart Growth principles by transforming abandoned municipal industrial property into attractive affordable housing. Detailed bid proposals and qualifications were issued on April 21, 2016 and Wood Partners was subsequently selected as the developer. The Wayland Board of Selectmen signed the Land Agreement with Wood Partners on July 31, 2017. The Planning Board

looks forward to reviewing the final site plan approval in 2018. The Town also recently received a \$2.4 million MassWorks Grant for water infrastructure improvements for this project.

<b>One Year Goals for the Number of Households to be Supported (By Population Type)</b>	
<b>Population Type</b>	<b>Number of Households</b>
Homeless (units reserved for homeless individuals and/or households):	45
Non-Homeless (for all units NOT reserved for homeless individuals and/or households):	84
Special-Needs (units reserved for households that are not homeless but require specialized housing or supportive services)	24
<b>Total (Consortium-wide) &gt;&gt;&gt;&gt;</b>	<b>160*</b>

**NOTE:** Units that are acquired and rehabilitated are only reported once under either rehabilitation or acquisition  
 \*Seven of the Framingham units support households that were defined by the City as “other”

<b>One Year Goals for the Number of Households Supported Through (By Program Type)</b>	
<b>Program Type</b>	<b>Number of Households</b>
Rental Assistance (for programs such as TBRA and one-time payments to prevent homelessness):	80
The Production of New Units (construction of new units, including conversion of non-residential properties):	36
Rehab of Existing Units (including reconstruction):	37
Acquisition of Existing Units (for programs such as downpayment assistance):	7
<b>Total (Consortium-wide)&gt;&gt;&gt;&gt;</b>	<b>160</b>

**NOTE:** Units that are acquired and rehabilitated are only reported once under either rehabilitation or acquisition.



## **AP-60 Public Housing - 91.420, 91.220(h)**

### **1. Actions planned during the next year to address the needs to public housing**

The Newton Housing Authority (NHA) has utilized the new position of licensed social worker to grow and expand its Resident Services Department. In conjunction with CDBG funds and Perpetual Benevolent grant funding, the Resident Services Department is evolving to meet the changing needs of NHA's tenant population. In response to the societal shift toward aging in place, Newton Housing Authority's Resident Services has strategically developed programming that promotes two core objectives: supporting healthy aging and building a sense of community within an environment of caring and dignity.

The Newton Housing Authority Resident Services Department promotes the objectives of healthy aging and community building by targeting its programming in the following three focus areas: reducing social isolation in older adults and persons with disabilities through recreational activities; providing activities focused specifically on health and wellness; and administering on-staff clinical and case management support. Issues that have been addressed by the Resident Services Department include but are not limited to; eviction prevention, crisis intervention, social isolation, fuel assistance, loss of public benefits, referrals and linkages to community supports.

Capital needs are assessed at all NHA properties annually and emergency and preventative maintenance is used to address needs as they arise. The CDBG Housing Rehabilitation program funds are also available as applicable for improvements and emergency repairs for Newton Housing Authority properties.

#### *Consortium Communities*

In FY19 (FFY18), 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 Housing Authority units. Additionally, the Bedford Housing Authority is completing its HOME-funded rehabilitation of Ashby Place in FY18 (FFY17).

In FY19 (FFY18), the Town of Brookline will begin to work with the Brookline Housing Authority to begin a multi-year Strategic Preservation Initiative. This project will take 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.

In FY19 (FFY18) the Concord Housing Authority plans to rehabilitate one federally-funded family housing authority unit with CPA funds. In FY18 (FFY17) the four new units at Peter Bulkeley Senior Housing Development were completed, using state, local, and HOME funds.

The Framingham Community Development Department consistently collaborates with the Framingham Housing Authority (FHA) to support projects that create rental housing and homeownership opportunities. In a developing project, the City will enter an initiative that supports a household in homeownership. Through the partnership, FHA will acquire a residential property. A homebuyer will be selected at random by lottery, and HOME funds will subsidize the lottery finalist's down payment on the FHA acquired property.

The Natick Housing Authority (NHA) successfully rehabilitated 6 Plain Street with HOME funds in FY17 (FFY16) and is nearing completion on the successful rehabilitation of the Coolidge House in FY18 (FFY17). New leadership at the NHA is assessing current conditions at all properties owned by the agency and rolling out comprehensive renovation plans using funds from all sources, including the HOME program (where applicable).

Though not yet ready for funding in FY19 (FFY18), the Town of Needham continues to work with the Needham Housing Authority (NHA) on plans to potentially redevelop its antiquated 152-unit Linden-Chambers project, ultimately creating a new community with additional affordable units. The Town helped the NHA plan and facilitate two retreats on January 28, 2017 and April 22, 2017 to discuss potential redevelopment efforts in more detail. The Town also helped the Needham Housing Authority prepare a Request for Proposals (RFP) to secure professional services to obtain more input regarding the feasibility of various projects. The Town of Needham continues to hold Community Preservation funds in reserve for the support of such a project.

The City of Waltham continues working with the Waltham Housing Authority on the rehabilitation of 37 Banks Street. The HOME program funding is being used to rehabilitate a large single family SRO that is leased to very low-income individuals. The first floor of the three story property will become entirely accessible with a new bath, rehabbed kitchen, living and bedroom area. There will be five additional living units and two additional baths on the second and third floors. A new fire suppression system will be installed, a new interior fire escape, and a new accessible ramp will be added to the exterior of the home.

In Watertown, to ensure that applicants, tenants, and participants have meaningful access to services, programs and activities, the Housing Authority will adopt and implement a new

Language Access Plan for those that may be limited in their English proficiency.

The Wayland Housing Authority (WHA), working with the Town of Wayland Community Preservation Committee, completed the installation of a fire suppression system at the Cochituate Village Apartments, which includes housing for seniors and persons with disabilities. The WHA utilized HUD Capital Improvement Program grant funds to upgrade fire alarm notification systems.

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

The Newton Housing Authority does not participate in any homeownership programs. Residents are involved in the PHA Plan and capital needs identification process through annual tenant meetings and communication with the Resident Advisory Board.

Information about new homeownership opportunities created through the City of Newton Homebuyer Assistance program will be disseminated to NHA tenants.

### *Consortium Communities*

In Bedford and Lexington residents gather monthly in the community building for a social event.

In Brookline, as any affordable homeownership unit becomes available through turnover, the Town's Housing Division manages this resale process and engages in extensive outreach and a lottery process. Public Housing tenants interested in homeownership opportunities are notified through the Housing Authority or by signing up for the Town's affordable housing listserv. A number of public housing tenants have taken advantage of these opportunities in the past.

In Framingham, the City's Community Development Department works closely with the Framingham Housing Authority to ensure that all residents are aware of the opportunities created by HOME funds. Any FHA resident that applies to a department program is added to the listserv for the department newsletter. The newsletter provides information on homeownership, rental, employment, Section 3, community development, committee meetings and more.

The Natick Housing Authority recently hired a new executive director after the existing director retired. The new director is reviewing the Authority's policies regarding tenant management and homeownership.

Waltham residents may participate in the management and operations of the WHA. The WHA is required to have one of its residents sit on its Board of Governors. That person has one of five votes to determine policy and procedures for the WHA and presumably 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. Finally, the Board of Governors provides an opportunity for residents to address the Board at monthly meetings by setting aside some time on the agenda for discussion of resident issues. Resident associations are encouraged to attend the meetings and bring forward any residential community issues.

The Watertown Housing Authority has an active Tenant Association and Resident Advisory Boards (RABs) in the family and elderly developments. The Authority communicates all capital need plans and operational issues to all the resident groups. The Authority is also a member of the Massachusetts Learning, Employment and Assessment Program to enhance resident employment and life skills.

The Wayland Housing Authority works to facilitate tenant participation in WHA operations. The WHA continues to encourage tenant participation in newsletters and the tenant handbook as needed. Staff meets with tenant groups on a regular basis or as needed, and tenants serve on the WHA board.

**3. If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance**

Not applicable. No PHAs in the Consortium have been designated as “troubled.”

## **AP-65 Homeless and Other Special Needs Activities - 91.420, 91.220(i)**

**Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including:**

- 1. Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**
  - Continue to Allocate Emergency Solutions Grant funds for a Street Outreach Program and Allocate Additional Funds towards Homelessness Prevention

Consistent with existing needs, HUD priorities, evaluation of ongoing programming, and CoC recommendations, Division staff and former BNWW CoC local providers have prioritized Homelessness Prevention activities during FY19 (FFY18). The City will continue to allocate Emergency Solutions Grant funding for Homelessness Prevention within the BNWW CoC geography. Homelessness Prevention is an effective method to avert homelessness and has proven to be successful over the past several years. At this point-in-time, two local agencies, the Second Step and Brookline Community Mental Health Center, will implement Homelessness Prevention activities during FY19.

Street outreach was not recommended for funding, however. Division staff, in combination with local providers, prioritized increased Homelessness Prevention resources.

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

BNWW CoC agencies integrated within the BoS Coordinated Entry System. Efforts were undertaken to ensure integration by April 1, 2017, including coordination of training held at Newton City Hall on March 16, 2017 with CoC agencies to discuss the BoS CE process, Vulnerability Assessment tool and referral requirements.

The BoS 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 is able to conduct 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.

### *Consortium Communities*

In Framingham, many of the Tenant-Based Rental Assistance (TBRA) program applicants are homeless or nearly homeless. The majority of these households earn 30% or less of the Area

Median Income and struggle to find affordable rental housing throughout the State. The City will allocate some of its HOME funds to support the TBRA program in FY19 (FFY18).

The Natick Affordable Housing Trust used town funds to provide emergency hotel vouchers to individuals who become homeless unexpectedly in FY18 (FFY17), and will continue to do so in FY19 (FFY18).

The Waltham Police Homeless Task force (HTF) is a team comprised of members of the patrol division that serve as a liaison and vital resource to the City's growing homeless population. They meet monthly as part of the Homeless Assistance Coalition and they lead the annual Point In Time Count in the City in co-operation with the Housing Division. The HTF also assists with nightly supervision of 35 homeless persons at the Bright School Warming Shelter. The shelter is open during inclement weather from December through March. The City of Waltham has employed a full time outreach worker in the Health Department to identify and assist with the homeless population. This position works with the Community Day Center and the HTF in evaluating the chronic homeless and connecting them to the resources they need to become stably housed.

The Wayland Community Fund, is a charitable committee established in 1997 that provides short-term, emergency financial assistance to Wayland residents. Emergencies include utilities, rent, medical needs, clothing, and food vouchers. The Town of Wayland and BayPath provide an Elder Nutrition Program that enables local elder agencies to supply nutritious meals to senior citizens. The Town also has volunteers that deliver approximately 50 meals per week.

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

- Review Shelter Services Allocation from the Emergency Solutions Grant

The US Interagency Council on Homelessness and the Balance of State, have established strategic goals to end and prevent homelessness, particularly to veteran, family, youth and chronically homeless populations. Division staff utilizes ESG funds for various shelter services, including those for survivors of domestic violence and men's and women's emergency shelters. The Second Step, REACH and the Middlesex Human Service Agency provide critical emergency and transitional housing for the BNWW region. ESG funds are also awarded to the only day shelter in Waltham, which provides, food, case management, counseling, legal services, and referrals to appropriate service providers. This funding source serves as a valuable resource for these emergency shelter providers, especially since those types of projects are not eligible to receive McKinney-Vento Act funds. The Pine Street Inn, though not funded by ESG, also operates several projects within the CoC and manages an experienced outreach team that engages those unable or unwilling to use a shelter. Pine Street Inn staff provides these individuals with referral

information, food, clothing, hygiene products, and blankets.

The BoS, in coordination with several agencies from former BNWW CoC, completed the 2018 Point-in-Time (PIT) Count on January 31, 2018. A total of 1,119 households and 2,296 homeless persons were counted throughout the entire BOS service area. Of those, 185 households and 404 homeless persons were counted in the Brookline-Newton-Waltham-Watertown geography.

Division staff also carefully evaluates the appropriation of Emergency Solutions Grant funds towards the rapid rehousing and homelessness prevention components of the ESG program, which can help reduce the number of families and duration of homelessness. Although there is a clear need and benefit of providing the shelter services, the CoC must strive for permanent housing stability in order to effectively end homelessness.

- Issue additional tenant-based rental voucher(s)

In FY15 (FFY14), the City inaugurated the Tenant-Based Rental Assistance Program (TBRA), with three households selected for participation. Under this program, the funds have provided rental subsidy and support services for income-eligible households currently living in the Commonwealth's overflow emergency shelters and working with the Metropolitan Boston Housing Partnership (MBHP). The program was predicated on the goal of coupling housing with supportive services geared in an effort to guide economic self-sufficiency. The program, in its current format, is nearing its end, but the Division will reconsider restructuring TBRA moving forward.

#### *Consortium Communities*

The Framingham Community Development Department made significant strides in addressing the emergency shelter and transitional housing needs of homeless persons through a partnership with SMOC that secured 58 single-room occupancy units for individuals in recovery. Outreach efforts have resulted in referrals to the City's Tenant-Based Rental Assistance program from organizations such as SMOC, Advocates and Wayside. The security deposit and first month's rent subsidizing program provided needed relief to renters, including domestic violence victims, housing insecure parents, and individuals in transition.

The Natick Affordable Housing Trust partners with the Family Promise program to transitionally house formerly homeless families in local churches, and, starting in 2019, at the affordable duplex the Trust is developing at 299 Bacon Street in Natick. The Natick Community & Economic Development Department also assisted Family Promise with permitting renovation of the organization's new social service facility in Natick Center. Additionally, the Trust uses town funds to provide emergency hotel vouchers to individuals who become homeless unexpectedly.

For the third consecutive year, the City of Waltham manages an overnight warming center for men and women aged 18 and older. The warming center is open from December through March between the hours of 7:30 pm and 7:00 am on days when the temperature reaches 32 degrees or below, or in the event of inclement weather like snow or freezing rain. The Housing Division provides tenant-based rental assistance to the homeless that are referred through the program's supporting agencies. The Housing Division and the referral agency work with the applicant through the application process and the TBRA rental contract to help the applicant(s) become self-sustaining.

**3. 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**

**a. Shortening the period of time that individuals and families experience homelessness**

ESG funding will continue to target Rapid Rehousing and Homelessness Prevention activities to quickly connect individuals and families with the support they need to exit homelessness and achieve housing stability. Aligning with HUD and City priorities to provide early interventions to prevent homelessness, additional funding has been allocated to Rapid Rehousing and Homelessness Prevention during FY19 (FFY18).

City staff and the BoS will continue to assess the challenges of the existing rental market within the neighboring communities of Brookline, Newton, Waltham and Watertown to determine the feasibility of scaling up this approach through local partnerships.

**b. Preventing individuals and families who were recently homeless from becoming homeless again**

- Utilize Emergency Solutions Grants for Homeless Prevention and Rapid Rehousing
- Educate service providers and CoC communities about available funds

In addition to Rapid Re-housing, the Division will also utilize ESG funding for Homeless Prevention to reduce the number of individuals and families who are evicted from housing. These funds provide the financial resources to keep at-risk households housed, as well as the supportive



services to help stabilize the household and ensure successful tenancies.

- Research and disseminate best practices for working with at-risk populations
- Identify and engage job training and employment services providers

A central goal of the City, BoS, and federal partners is to reduce the number of individuals and families becoming homeless through the provision of appropriate supportive services and financial assistance. Engaging, educating, and seeking cooperation with stakeholders, regarding the decrease of risk factors leading to homelessness, will assist in accomplishing this goal. Key partners will be necessary to ascertain and ensure that critical services are available to adequately engage in the prevention of homelessness and to comprehensively support previously homeless individuals and families experiencing community integration issues. Enforcement of ESG policies and procedures will supplement these efforts, through the promotion and access of mainstream services with particularly at-risk households.

**c. facilitating access for homeless individuals and families to affordable housing units**

- Finalize and Review Housing Strategy to identify sites for permanent supportive housing

Following the directive of the United States Interagency Council on Homelessness (USICH) and the BoS's Ten-Year Plan to End Homelessness, the City's Department of Planning and Development is focused 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. An underutilized, 16,900 square foot city parcel, located at 160 R Stanton Avenue, was one of those sites selected specifically for the creation of nine to twelve units of non-age restricted permanent supportive housing for chronically homeless adults with disabilities.

The City of Newton has made significant progress in these efforts. An RFP was released on August 30, 2017, with proposals due October 5, 2017. Jewish Community Housing for the Elderly (JCHE), the sole respondent, was selected as the developer, following the review of their proposal by a five member evaluation committee. JCHE is now advancing development efforts, and has begun taking steps to engage the neighborhood. The first neighborhood meeting held on February 15, 2018 and JCHE is currently working on securing project funding.

Additionally, the BoS will facilitate a BNWW area needs assessment during FY19 (FFY 18) to get feedback from local providers, direct care workers and constituents regarding housing and

homeless needs. The initiative will culminate in a report that can complement ongoing planning efforts.

- Prioritize 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.

#### *Consortium Communities*

The Bedford Youth and Family Services works with Bedford residents who are receiving public assistance and may be at risk of losing housing by providing information about counseling, food stamps, fuel assistance, or TAFDC, and emergency financial assistance. The veterans' agent works closely with the Department of Veterans Affairs and provides state financial and medical (Chapter 115) benefits to an average of 50 veterans, over half of whom have been previously homeless and now reside in VA housing.

The Town of Concord's Community Services Coordinator and the Health, Fire, and Police Departments work on an individual basis to assist homeless persons in finding emergency shelter and transitional housing, while also working together to identify any at-risk households or individuals and assist them in seeking assistance programs as needed. In addition, Concord works with regional resources when there are homelessness issues resulting from a home foreclosure.

The Framingham Community Development Department is also a member of the Massachusetts Housing and Community Development Department's Balance of State, Continuum of Care project review committee. Serving on this committee allows the department to understand the housing and service needs for the homeless and improve its own programs targeting homeless individuals and families.

The Massachusetts Department of Developmental Services provides 38 units of housing in Natick. Most of these units are occupied by persons with mental and/or physical disabilities.

The City of Waltham allocates CDBG funds for homelessness prevention through an emergency assistance program. Individuals and families facing homelessness due to rent or energy billing arrears, or other unforeseen circumstances, are able to apply for financial assistance in order to prevent homelessness. The HOME TBRA program provides rental assistance to homeless with supportive services through local agencies and the Waltham Police Homeless Task Force. The City has contracted with the Charles River Community Health Center to provide intake screenings on

Waltham's most vulnerable residents. Intakes include behavioral screening, initial counseling, support and placement in a facility adequate for the condition of the client.

The Sudbury town social worker manages the HOPE Sudbury applications that provide a range of homeless prevention services, including: grants toward rent to prevent evictions, landlord mediation, budgeting education and information referrals.

**4. Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: 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); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs.**

During FY19 (FFY18), the City will advance the Housing Strategy that has defined the approaches and actions necessary to enable Newton to reach its goal of achieving a minimum of 10% of Newton's housing stock affordable to low- and moderate-income households by 2021. This includes substantial progress to the development of nine to twelve units of non-age restricted permanent supportive housing for chronically homeless adults with disabilities. An RFP for 160 R Stanton Avenue, an underutilized, 16,900 square foot city parcel, was released in late FY18 (FFY17). Community Housing for the Elderly (JCHE), the chosen developer, has begun the development process by taking steps to engage the neighborhood.

Additionally, a robust ESG program that appropriately targets homeless prevention and rapid re-housing programs will provide vulnerable individuals and families with critical resources to avoid crisis and stabilize. ESG recipients and CoC providers work closely with the MA Department of Children and Families (DCF) and the MA Department of Mental Health (DMH) on discharge policies for youth and clients of DMH. Brookline Community Mental Health Center develops individualized service plans and transition plans for Transition to Independent Living Program participants (ages 16-22). Youth are routinely discharged to reunify with their families or to another housing option if the youth's age permits or if reunification is not possible. The Community Day Center of Waltham also coordinates closely with the Newton-Wellesley Hospital and neighboring police departments to assist extremely vulnerable, homeless and at-risk clients in stabilizing and accessing critical resources.

The BoS will be a key partner in fostering relationships with facilities potentially discharging participants to homelessness, establishing a far-wider continuum and network of services. These services range from safety and basic needs at the emergency shelter level, to case management

and daily living skills at the transitional and supportive housing stage, and finally to sustainable community integration through permanent housing.

## **AP-75 Barriers to affordable housing - 91.420, 91.220(j)**

- 1. Actions it planned 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**

As in many other communities throughout greater Boston, one of the biggest challenges to the development of affordable housing in Newton is the Zoning Ordinance. While reasonable regulation of new development is important and to be expected, it is essential that the City closely examine its ordinances for potential obstacles to affordable housing development. Particular zoning and other city policies that have the potential to limit affordable housing include the following:

- Multi-family permitting processes. In Massachusetts, either a special permit or a comprehensive permit under Chapter 40B is typically required to create any multi-family housing (i.e. more than two units). These processes add time and cost to developments that could otherwise more easily create affordable housing units, and the process can become controversial.
- Accessory apartment zoning. Accessory apartments are often more affordable to rent because they tend to be smaller, but the process for approval of these units is complicated and typically requires a special permit. It is estimated that there are 1,000 illegal accessory apartments in the City, all of which have not been properly inspected for compliance with the Massachusetts State Building Code and may pose serious health and safety concerns for occupants. Recently the City's Zoning Ordinance was amended to streamline the permitting of illegal accessory apartments which can be proven to be pre-existing from 1999, if they can be made code compliant. In April 2017, the City adopted the Accessory Apartment Ordinance which allows internal accessory apartments by-right in all Newton single and two-family homes.
- Lodging House Zoning Ordinance. In a lodging house, the lodger rents a rooming unit that is typically a bedroom, including a seating area. The lodger has access to, but not responsibility for, shared cooking and bath facilities with others in the house. They rent their rooming unit directly from the lodging house operator, who maintains the common areas, including the kitchen and bath. A lodging house tends to offer a more affordable living situation than a traditional rental apartment. Lodging houses are an allowed use by Special Permit in all multi-family districts of the City. Although lodging houses are defined,

no standards for the structure or operational requirements are included in the City's zoning or other ordinances. Since spring 2017, the City has been working to develop a proposed set of standards by which to regulate not only the formation of a lodging house, but also the continued operation of a lodging house. The new lodging house amendment specifically allows lodging houses above ground floors in BU1, BU2, BU3, BU4, MU1, MU2, MU3, and MU4 districts.

- Procurement policies. The City's procurement policy for affordable housing projects that utilize CDBG and HOME funds can increase overall project costs and the upfront time required to develop plans and specifications. The City may explore changes to the policy that could mitigate this barrier while ensuring fair and open competition.

In recognition of these existing barriers to the development of affordable housing, Division staff along with staff in the Long Range Planning Division intend to focus on the following programs and topic areas in the upcoming year.

### **Zoning Reform**

In FY19 (FFY18), the City will continue to pursue amendments to the existing Inclusionary Zoning Ordinance in an effort to further leverage private development to create affordable housing. The City also intends to revise its zoning to increase permitting flexibility and development incentives for affordable housing. Potential zoning revisions include: 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." These measures will build on the City's efforts to further support housing choice in Newton through the Accessory Apartment Ordinance and the Lodging House Ordinance update.

In addition to pursuing amendments to the Inclusionary Zoning Ordinance, the City will seek additional regulatory changes in FY19 (FFY18) through the City's Council's Zoning Redesign Project. Zoning Redesign was initiated in 2011 and Phase One of the project was completed in 2015. The initial phase successfully reorganized the existing ordinance, making it easier to understand and interpret.

Phase Two of the Zoning Redesign Project will create a new, context-based zoning ordinance that provides guidance and rules for the development and redevelopment of land in Newton. Context-based means the new zoning will sustain the City's existing development forms, reflect the building patterns of Newton's different neighborhoods and village centers, and allow new growth to occur in appropriate places and at appropriate scales. The Zoning Redesign Project intends to

bring more predictability to land use regulation and the permitting process. 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.

### **Expansion of the Homeowner Rehabilitation Program**

Over the past year, the City has expanded the allowable scope of work available through the Housing Rehabilitation Program for the Newton Housing Authority and other nonprofit housing organization projects in order to more comprehensively address critical repairs for health and human safety. Previously, allowable work was limited solely to accessibility improvements. The City will also explore expanding the Housing Rehabilitation program to existing accessory apartments and lodging houses that require repairs to ensure resident health, safety, and building code compliance. Expansion of the program will be considered in conjunction with the recent adoption of the Accessory Apartment Ordinance and the Lodging House Ordinance. Rental income from accessory apartments can help low- and moderate-income owners make mortgage payments and also offer “naturally affordable” small housing units for low- and moderate-income renters that are identified in the FY16-20 Consolidated Plan’s Needs Assessment as a means toward encouraging diversity in the City’s housing stock.

### **Fair Housing**

Actions anticipated for addressing concerns regarding fair housing include the following:

- The City continues to advance the redesign of its current Zoning Ordinance, the most comprehensive revision to its zoning in decades. Division staff and the Fair Housing Committee (FHC) will actively ensure that proposed zoning changes support the City’s goal to affirmatively further fair housing and avoid creating disparate impacts to protected classes.
- As the deadline for submission of Assessment of Fair Housing has been suspended, the City, WestMetro HOME Consortium and FHC will embark on the development of the 2021-2025 Regional Analysis of Impediments. Consistent with the Fair Housing Act and Fair Housing Planning Guide, the City, in combination with the Consortium and FHC, will conduct an updated Analysis of Impediments to Fair Housing Choice (AI) and outline meaningful actions to overcome the effects of identified impediments.
- The FHC will present findings related to a discrimination study completed for Newton by the Fair Housing Center of Greater Boston. The final report will include a quantitative and

qualitative analysis and discussion of community trends as they pertain to housing discrimination. The completed study will inform the 2021-2025 AI.

- The City seeks to ensure that consideration of fair housing goes beyond regulatory minimums in order to implement the City’s documented fair housing development goals and objectives. The Fair Housing Committee assisted the City in developing the Fair Housing Project Consideration Tool for staff to utilize during project review. The tool goes beyond the reach of regulatory measures as City staff evaluate applicable housing development projects for consistency with fair housing goals and policies as outlined in the FY16-20 Consolidated Plan. All evaluations will result in a statement that “the objectives of the City’s Consolidated Plan, including fair housing, have been considered in this review.”
- Information designed to guide the public and developers on the process for developing affordable housing and Comprehensive Permit projects in Newton will continue to be available on the Planning and Development Department website. The webpage details the City’s fair housing policy and obligation to affirmatively further fair housing.
- The City’s Fair Housing Statement is posted on its website. This Statement is also available in written documents through city departments, venues, sponsored events, activities targeting abutters of pending development, and zoning related actions affecting housing. At community meetings related to pending housing developments, the City will continue to inform the public of the City’s responsibility to affirmatively further fair housing, disseminating in writing, the City of Newton’s Fair Housing Statement. The City will include the US Department of Housing & Urban Development’s (HUD) Fair Housing logo on all pertinent housing documents.
- The City and FHC will revamp its efforts to plan for informative and meaningful fair housing programming, striving for a minimum of one event and one outreach campaign annually. Training will be provided on an annual basis to city councilors, city staff, community partners, the general public and others involved in activity related to the provision of housing. Presentations may include a variety of topics such as disparate impact and fair housing principles. Additional events and outreach will be undertaken if circumstances support these efforts.
- The City’s fair housing complaint process is driven by the Newton Human Rights Commission. The Human Rights Commission is authorized under the City of Newton Ordinance to consider claims of discrimination related to housing in Newton that are filed



within 300 days of occurrence. The Commission acts as a neutral party which receives and investigates complaints, attempts to resolve them informally and propose remedial actions, if necessary. Complaints can be filed to the Commission in person, through an online discrimination reporting tool, or in written form. The City, Division staff and the FHC will promote this resource, particularly to individuals and families of protected classes, in an effort to report and stem potentially discriminatory actions. Division staff will also encourage nonprofit housing providers to report similar acts of discrimination and enforce responsiveness consistent with City policies to address discriminatory matters.

- Additionally, the City progresses on efforts to create nine to twelve units of non-age restricted permanent supportive housing for chronically homeless adults with disabilities. The priority parcel, 160 R Stanton Street successfully underwent the City's disposition and procurement process. The developer, Jewish Community Housing for the Elderly, is now advancing development efforts, and has begun taking steps to engage the neighborhood. The first neighborhood meeting was held on February 15, 2018.

#### *Consortium Communities*

In June of 2015, the City of Newton and the WestMetro HOME Consortium submitted its Regional Fair Housing Plan for the years FFY2015-2020.

The Town of Bedford also completed its Analysis of Impediments to Fair Housing Choice in 2013, which outlined five key barriers to affordable housing: lack of accessory apartments; monitoring and maintenance; density and cluster developments; parking; and other ongoing efforts. Town staff will continue to examine the Accessory Apartment Bylaws to determine how to increase the number of accessory units. Staff will work with the Regional Housing Services Office (RHSO) to fulfill monitoring requirements, as well as seek out additional affordable housing opportunities to create units within existing zoning guidelines. Finally, staff will review zoning bylaws to gain a better understanding of the impact of parking standards on affordable housing development, promote fair housing and encourage the recruitment of minority applicants to town boards and committees.

In 2016, the Town of Brookline completed a Housing Production Plan which was approved by the State's Department of Housing and Community Development. This Plan outlines strategies that the Town will pursue to increase affordable housing production. It also identifies specific areas of Town that can support additional affordable and mixed-income housing, with a particular focus on underutilized parcels in Brookline's commercial corridors. Brookline will continue to use

its Zoning Bylaw proactively to encourage affordable housing as part of a market-rate project through its inclusionary zoning provision. In FY19, the Housing Advisory Board will be undertaking an evaluation of the Town's Inclusionary Zoning bylaw to see if it can be strengthened to increase affordable housing benefits of on-site units and/or cash payment to the Housing Trust. In addition, the Housing Advisory Board continues to explore options to allow Accessory Dwelling Units in conjunction with the Brookline Community Aging Network.

Concord continues to work towards addressing identified impediments as documented in the 2013 Analysis of Impediments, the 2015 Regional Fair Housing Plan, and the 2015 Concord Housing Production Plan. Specific actions aimed at addressing the high cost of existing housing and shortage of available land include working with the Concord Housing Development Corporation to develop Junction Village, an affordable housing proposal on former state land in West Concord; using CPA funding to restore the affordability of units at the Emerson Annex building when they become available and establish new affordable housing restrictions; assisting the CHDC's Small Grants Program to help low- and moderate-income homeowners make necessary safety and other improvements to their existing homes; and utilizing HOME funds to rehabilitate and improve the accessibility of existing affordable housing units and create new units when possible. The Town will also continue to support the work of the Concord Housing Authority and of the Concord Housing Development Corporation wherever possible. The Town will encourage development which provides new affordable units dispersed widely throughout the community; consider new Smart Growth legislation and other models for developing housing within the community; encourage mixed-use developments which provide some affordable housing at close proximity to transportation and community services; and, provide guidance and assistance to existing affordable housing homeowners and potential developers in identifying energy efficient programs and incentives to defray the cost of new construction and reduce overall housing costs.

The City of Framingham's Community Development Department is committed to operating a Tenant-Based Rental Assistance program as well as creating new affordable housing through partnerships in FY19 (FFY18). In the coming year, Framingham will foster housing development by providing more incentives, such as tax increment financing; enforcing newly implemented zoning changes that encourage developer investment in the downtown; and using obsolete properties for new affordable or mixed-income housing. City-wide, there is an Inclusionary Zoning Bylaw, which requires that 10% of units in new housing developments with 10 or more apartments be reserved for households earning 80% or less of AMI. Seventy-five new units from pipeline projects are expected in the next year and near future.

The Town of Lexington completed its Analysis of Impediments to Fair Housing Choice in 2013, as well as the 2015 Regional Fair Housing Plan. The single largest barrier to fair housing choice in

Lexington is its high cost of entry, as a result of the relative scarcity of housing units combined with the high regional demand. Lexington continues to work on zoning ordinances to encourage affordable components and to work in partnership with developers for the creation of affordable units.

Natick faces the barriers of the high cost of construction and high demand for property, which makes it difficult to maintain and develop housing that is affordable to a diverse population. The Town has seen several 40B, 40R and local HOOP projects which encourage developers to provide affordable housing while developing these cost restrictive properties. Natick also promotes zoning bylaws which encourage the further development of affordable housing, including the expanding of 40R and HOOP districts and implementing Inclusionary Zoning. The Town is exploring the creation of “Tiny Houses” to provide low-cost housing, and adopting a Transitional Overlay Option Plan (TOOP) that will help promote development of accessible, barrier-free housing. In January of 2018, the Natick Planning Board started drafting a zoning bylaw amendment for a Comprehensive Inclusionary Requirement for Affordable Housing, which will mandate at least 15% of units in residential developments with six or more dwellings be eligible for inclusion on the Commonwealth’s Subsidized Housing Inventory (SHI). Such housing is mandated by statute to be affordable to households earning at most 80% AMI. The Natick Zoning Board of Appeals also started reviewing a new Chapter 40B Comprehensive Permit application in January of 2018 for Cloverleaf West, a proposed 124 unit apartment complex with 25 apartments affordable to households earning 60% AMI.

Given limited developable property and zoning constraints, the Town of Needham is promoting rental redevelopment projects in primarily commercial areas, where higher densities are more appropriate and where housing can create a “work, live and play” environment. For example, the Town is working with developers of property in Needham Crossing, a major business park, to develop some of their recently acquired property for residential use, including affordable housing. This project has been processed through the State’s Local Initiative Program (LIP), the “friendly Chapter 40B” alternative, to override local zoning. Construction is well underway on the 390 rental units, 98 of which will be affordable based on state LIP requirements. The Town also approved a 136-unit Chapter 40B rental development on Greendale Avenue that will include 34 affordable units. These projects will create a total of 132 affordable rental units which will be ready for occupancy in the spring or summer of 2018. Another five affordable rental units were created as part of special zoning through an Elder Services Overlay District that required 10% of all independent living units be affordable. A new Mixed-Use Overlay District (MUOD) was recently approved by Town Meeting to promote mixed uses, including a mandate for including affordable housing, in an area in proximity to Route 128 and Highland Avenue that is appropriate for higher housing densities and mixed residential and commercial uses.

As mentioned above, another Needham initiative involved a grant from the Massachusetts Association of Health Boards for Healthy Aging to conduct an assessment of community conditions and barriers to senior-friendly housing and transit. The project included special focus groups, interviews, research and data analysis, and a community survey. The most prominent theme in all of the focus groups was the lack of affordable and senior-appropriate housing in the community. Recommendations from the study included ways to adapt existing homes to enable seniors to age in place, to modify zoning to allow accessory apartments, and to create improved housing opportunities for seniors. The Planning Board and Board of Selectmen are currently studying these recommendations.

The largest barrier to affordable housing in Waltham is the constant increase in housing costs. While there are public policies to create affordable housing and incentivize affordable housing, a majority of Waltham residents are unable to afford their current housing situation. Funding constraints hinder the City's ability to keep up with subsidizing housing in order to keep families in their homes and avoid homelessness. Public comments received through general meetings and forums also indicate the Town's lack of ability to increase housing stock. Many lots have been built-out throughout Waltham and public comments highlighted the increase in congestion. One of the Community Housing Development Organizations (CHDO) serving the Metro West HOME Consortium has indicated the largest barrier is the competition for an affordable unit on the open real estate market.

The Assessor's Office actively identifies affordable home ownership units in Watertown, and affirmatively chooses to keep the Town's assessment of these units affordable. Watertown Housing Partnership continues to strongly advocate for affordable housing, including a 2017 zoning amendment to allow assisted living facilities in more areas of Town. The Town adopted the Community Preservation Act in the fall of 2016. Some of the funding from this local tax is expected to be used to create additional affordable housing.

It is cost prohibitive to create affordable housing in Wayland. Available land for the development of housing is limited and expensive. With minimum lot sizes and no zoning provision for multi-family units, affordable housing is only permitted through Chapter 40B. The Town of Wayland has taken steps to remove these barriers by utilizing town owned land for affordable housing. Examples include the Nike Development, 11 units of owner occupied affordable housing; River's Edge, 190 units of a potential multi-family housing; and Stonebridge Road, four units of affordable housing. Wayland will continue to develop its pipeline of affordable housing to assist low-income households in the purchase and rental of safe and decent housing.

## **AP-85 Other Actions - 91.420, 91.220(k)**

### **1. Actions planned to address obstacles to meeting underserved needs**

Please refer to section AP-35: Projects.

#### *Consortium Communities*

Many of the Consortium communities will continue to work with staff, developers, consultants, and property owners to look for affordable housing development opportunities.

The City of Framingham will collaborate with town departments and community organizations such as the Veterans Department, South Middlesex Opportunity Council, Inc., and United Way of Tri-County to disseminate information about the Town's security deposit assistance program and down payment assistance program. These programs help families returning to the rental market or exploring the possibility of homeownership.

The Town of Natick is considering adopting a Transitional Overlay Option Plan (TOOP) into its Zoning Bylaw that will help promote development of accessible, barrier-free housing.

In the City of Waltham, 13 percent of the lowest income census tract is made up of non-English speaking residents, which creates a barrier between service providers, potential employers, potential landlords, and the residents. Waltham works closely with applicants of the tenant-based rental assistance program and social service providers to ensure that the non-English speaking population understands the program and is able to apply.

### **2. Actions planned to foster and maintain affordable housing**

In FY19 (FFY18), the City will pursue strategies to preserve and maintain existing affordable housing units. Newton will administer a Downpayment/Closing Cost Assistance Program to support the resale of existing deed-restricted homeownership units to low-income households. The City will also continue to make rehabilitation funds available to nonprofit owners of affordable housing to preserve the physical integrity of the City's affordable housing resources.

#### *Consortium Communities*

To foster and maintain affordable housing, the City of Framingham will employ a series of new and in-practice strategies that include the following:

- Leverage HOME funds against other sources
- Collaborate with the Framingham Housing Authority on new projects
- Recruit and engage developers on initiatives that foster affordable housing

- Explore housing options, such as co-housing and the production of multiple smaller homes on larger lots
- Analyze and address the regulations that limit pilot projects
- Create partnerships with financial institutions that support affordable housing efforts

The Town of Concord is assisting the Preservation of Affordable Housing to preserve 96 units of housing at Bedford Village with \$3,000,000 of Bedford CAP funds. This development was originally funded through the State's 13A program, and the affordability restriction are expiring March 2018.

### **3. Actions planned to reduce lead-based paint hazards**

Newton's Housing Rehabilitation program currently 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 deferred payment loans to fix building and safety code violations. This successful program will be continued in FY19 (FFY18).

As noted in the Needs Assessment and Market Analysis Chapters of the FY16-20 Consolidated Plan, the reported incidence of lead poisoning is low in Newton and surrounding communities. However, over 80% of housing in the City was built before 1980 and therefore a majority of those units are presumed to have lead hazards. As a result, the City will continue to make lead paint abatement and the removal of asbestos and other such health hazards a priority in the Housing Rehabilitation program. The statistics on percentage of housing in Newton built prior to 1978, when lead paint was banned, are comparable to the statistics for the Consortium as a whole.

These specific lead-based paint hazard prevention and remediation activities are incorporated into the City's housing policies and procedures. The City's Housing Rehabilitation program is marketed to income-eligible homeowners and/or landlords with more than 50% income-eligible tenants to ensure suitable safe living conditions, which is one of the primary tenets of the CDBG program. In addition, once a rehabilitation application is accepted, the City's Housing Rehabilitation and Construction Manager walks through the entire house with the homeowner, not just the area identified by the applicant as needing repair. In this way, staff is able to identify and remediate all unsafe or unhealthy living conditions. Often the issues identified are mental health related (i.e. hoarding, dementia etc.) as well as general physical disrepair. In these cases, the homeowner can be referred to a social service agency whose staff can appropriately address those other needs as well.

### *Consortium Communities*

Many of the Consortium communities cited MassHousing's *Get the Lead Out* program as an option for residents. For all of the Consortium communities, new affordable construction is free from lead paint.

The Towns of Bedford, Concord and Sudbury operate similar small grants programs that will continue to serve as a financial resource for low- and moderate-income families who need to fund lead paint remediation and other necessary repairs to maintain safe and healthy homes.

The Town of Brookline continues to provide referrals to the State's "Get Out the Lead" program which provides no or low-interest financing to income qualified households for lead abatement.

The Framingham Community Development Department leverages HUD-allocated dollars against Get the Lead Out (GTLO) program funds to reduce hazards in homes and maximize repairs made through the City's Housing Rehabilitation program. With GTLO, client de-leading costs are sponsored by MassHousing while entitlement funds are used to make all other housing repairs.

The City of Waltham continues to make lead paint abatement and the removal of asbestos and other such health hazards a priority in the CDBG Housing Rehabilitation program. The use of CDBG funds enables the City to offer deferred de-leading loans to owner-occupiers of multi-family properties.

All new construction in the Consortium communities is free of lead paint.

#### **4. Actions planned to reduce the number of poverty-level families**

One of the priorities of the Housing and Community Development Program is to fund programs and services for poverty-level individuals and families. According to data from the previous decennial Census (in 2000), 2.6 percent of families and 4.3 percent of individuals in Newton were living below poverty level. These percentages represent 811 families and 3,604 individuals. For the most recent five-year ACS estimate (2010-2014), those figures increased to 3.9 percent and 5.6 percent, respectively, which represent approximately 1,215 households and 4,868 individuals. These numbers are similar to the 2013 estimates, as they were 4.5 and 6.5 percent respectively. The 2017 and 2018 federal poverty guidelines are listed in the following table.

Size of Household	POVERTY GUIDELINES(48 Contiguous States and D.C.)	
	2017	2018
1	\$12,060	\$12,140
2	\$16,240	\$16,460
3	\$20,420	\$20,780
4	\$24,600	\$25,100
5	\$28,780	\$29,420
6	\$32,960	\$33,740
7	\$37,140	\$38,060
8	\$41,320	\$42,380
For each additional person, add	\$4,180	\$4,320

Division staff administers the City’s Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME), and Emergency Shelter Grant (ESG) programs. The funds from these federal programs are used locally for programs and projects that target and provide the maximum benefit to extremely low- and moderate-income persons.

The City prioritizes the funding of human service and homelessness assistance programs to support low-income Newton families in achieving self-sufficiency. Continued support for these anti-poverty programs is crucial as they provide vulnerable, at-risk families access to critical supportive services, housing and relocation stabilization services, advocacy, affordable child care, emergency housing, financial literacy, skill building, and job preparedness. The provision of such programming is necessary in addressing the economic, housing and health challenges facing low-to-moderate income residents, helping families move out of poverty.

Additionally, the BNWW CoC, now merged with the BoS CoC, works together to ensure the support services are well targeted, especially for chronically homeless persons within the geographic area. In 2014, the CoC developed a Ten-Year Plan to promote community-wide



support to end homelessness, detailing the following strategies aiming to reduce the families living in poverty: Prevention, Housing for Homeless and Chronically Homeless Individuals and Families, Supportive Services, Engagement of Key Stakeholders and Public Education and Awareness. The goals set forth in the Commonwealth's Plan to End Homelessness for implementation by the BoS align closely, and include:

- Increasing the number of permanently supportive housing units;
- Improving job readiness and achieving employments;
- Providing homelessness prevention and rapid rehousing assistance; and
- Providing case management services to increase the likelihood of residential stability.

The public service needs assessment conducted for the FY16-20 Consolidated Plan identified the following priorities for families and individuals in poverty.

- To increase the number of transitional (for survivors of DV and their families, as well as unaccompanied homeless youth) and permanent housing units within the CoC's communities of Brookline, Newton, Waltham, and Watertown;
- Continue to use CDBG, ESG, and other financial resources to provide support services for individuals and families that are homeless or are at-risk of homelessness;
- Continue to improve the transition as individual families move from homelessness to permanent housing.

A number of Newton's programs serving poverty-level and low-income households are directly administered by local organizations, including The Second Step, REACH Against Domestic Violence and the Community Day Center of Waltham. These programs are designed to impact the needs of this vulnerable population.

#### *Consortium Communities*

The Bedford Youth and Family Services (YFS) envisions its role as a force in fostering a healthy community and improving the quality of life for all Bedford residents by identifying and addressing the social, emotional, and developmental needs of children, youth, adults, and families. The Bedford YFS provides eligible households with fuel assistance and makes referrals to other needed resources.

The City of Framingham continues to support, through its entitlement funds, access to education, health care, employment, transportation, and other support services for low- and moderate-income households. At every opportunity, the City aims to reduce poverty by providing information about available resources, continuing to improve the department's services and programs, and notifying poverty-level families of job opportunities. This approach will allow the department to link low- and moderate-income families to economic development, employment

and training opportunities. In addition, the Community Development Department sponsors local agencies providing ESL classes; after-school programs; as well as hunger relief services for individuals and families experiencing hardship with the goal of alleviating poverty.

The Town of Needham is also exploring the introduction of a small grants program as a financial resource for low- and moderate-income households who need to fund lead paint remediation and other necessary repairs to maintain safe and healthy homes.

Healthy Waltham, a CDBG funded program, provides programs to parents and children focused on the growing, selection, preparation, and presentation of healthy food. The program is offered at four locations and includes cooking demonstrations, hands-on food preparation, nutrition information, food safety, creative ways of increasing healthy eating practices, and eating together. Healthy Waltham also provides Healthy Living workshops for senior citizens at the Stanley Senior Center. The workshops promote healthy lifestyle behaviors to improve the health of older adults, including regular physical activity and eating a healthy diet. The Salvation Army HOPE Kitchen is a daily meal program that serves breakfast and lunch from Monday to Friday in Waltham.

#### **5. Actions planned to develop institutional structure**

The Housing and Community Development Division will continue to enhance program coordination functions through improved inter-departmental communication, earlier identification of projects and priorities, continued engagement of local, private, nonprofit, state and federal partners and a greater focus on outcome measures.

For many of the Consortium communities, the biggest gap in institutional structure results from limited departmental capacity due to larger workloads, staff turnover, and small numbers of staff.

At its spring 2017 Town Meeting, the Town of Needham established a Municipal Affordable Housing Trust to oversee housing issues as well as a dedicated fund to support its efforts to address unmet community housing needs. The Board of Selectmen, the Town Manager and an at-large member will serve as Trustees and an account has been established.

The City of Waltham increased the staff of the Housing Division with a part-time housing specialist and an outreach worker in the Health Department to assist with the HOME Tenant-Based Rental Assistance program as well as the homeless outreach component of the CDBG program. The designation of a point person to be available for homeless individuals walking in and/or making appointments to secure supportive services and housing options has been very positive for the City. Waltham has been able to assist more individuals and put greater resources

and time into providing the services residents are seeking.

**6. Actions planned to enhance coordination between public and private housing and social service agencies**

Please refer to section AP-10: Consultation at the beginning of this plan.

## Program Specific Requirements

### AP-90 Program Specific Requirements - 91.420, 91.220(I)(1,2,4)

#### HOME Investment Partnership Program (HOME) Reference 24 CFR 91.220(I)(2)

1. A description of the guidelines that will be used for resale or recapture of HOME funds when used for homebuyer activities as required in 92.254, is as follows:

For those communities that have utilized HOME funds for homebuyer and homeownership activities, program participants are required to occupy the property acquired with assistance through the program as their principal residence for the duration of the Affordability Period, in accordance with **24 CFR 92.254(a)(4)**. The Affordability Period is determined by the amount of HOME financial assistance provided to the program participant, as detailed in the table below.

Downpayment/Homebuyer	Affordability Period
Less than \$15,000	Five (5) Years
\$15,000 - \$40,000	Ten (10) Years
Over \$40,000	Fifteen (15) Years

Period of Affordability Chart

#### ***Bedford, Belmont, Concord, Lexington, Needham, Sudbury and Wayland***

These communities are unable to utilize HOME funds for ownership units of new construction due to the conflicts between the State's affordable housing deed riders and the HOME Program rule, with respect to the resale and recapture provisions. These communities understand that if a HOME-assisted homeownership project or program is put forward, the recapture/resale provision will have to be submitted to HUD (through the Consortium Administrator) for approval prior to HOME funds being used for such assistance. This guideline has not changed since the submission of the FY16-20 Consolidated Plan.

#### ***Brookline***

When providing homebuyer assistance, that is, funding directly to a homebuyer to purchase an existing unit at a market price, the Town will continue to pursue two different strategies.

- (1) If the unit is located in a property with fewer than six units, at the time of resale, the seller will repay to the Town the down payment assistance provided plus that portion of the net appreciation, if any (current market price minus original sales price, appraisal fee, if any, brokerage fee up to five percent of resale price, and the

depreciated cost of approved capital improvements) which reflects the proportion of public subsidy to total equity invested. Total equity consists of Town homebuyer assistance, owner down payment, owner pay-down of principal and, for consistency with HUD requirements, the cost of capital improvements referenced earlier. In no case will the owner be required to repay the Town more than the net proceeds for the sale, that is, the sales price minus non-HOME loan repayment and sale-related and closing costs.

- (2) If the unit is in a property with six or more units, the Town will have a right of first refusal at a price which represents the original purchase price, minus the subsidy, adjusted by changes in AMI or 80 percent of median income, whichever is lower, plus compensation for the depreciated cost of approved capital improvements, plus the amount in the condominium association's segregated capital replacement account attributable to the unit. In the event that the Town cannot exercise its rights, the seller will be free to sell on the market and repay the loan with shared appreciation in accordance with (1), above.

The Town will continue to use the Commonwealth of Massachusetts' Affordable Housing Deed Rider as a resale restriction for units which are offered – through inclusionary zoning, the State Chapter 40B program and/or various non-HOME subsidies. According to this deed rider, resale price is based upon increases over time in Area Median Income, adjusted by the commercially reasonable cost of approved capital improvements, depreciated over the remaining years of the owner's occupancy, as long as the price at resale is neither more than what a range of income-eligible buyers can afford nor less than the owner's initial purchase price.

However, where HOME funds are provided to a developer in order to acquire and rehab or build new units for sale at affordable prices, the Town will use a resale agreement running with the land that will provide the owner with a fair return on investment, while assuring that the unit will be affordable to a range of income-eligible buyers at least through the HOME period of affordability. Resale price will be the initial sales price plus the commercially reasonable cost of approved capital improvements depreciated over the remaining years of the owner's occupancy, plus return on investment. Investment will be defined as the original downpayment, annual contributions to principal, and commercially reasonable cost of approved capital improvements. Return on investment will be calculated as the sum of the annual interest on the owner's cumulative investment (without compounding), based on the interest rate of ten-year bond obligations of the United States Treasury.

With regard to repayment for capital improvements, capital improvements must be approved beforehand, and be of function and quality (or be so valued) consistent with the use of the housing as affordable housing. The capital improvements are those owned by the condominium owner (and not part of common space) and might include, for example, the replacement, due to damage or long term wear and tear, of windows, heating or hot water systems, and stove, refrigerator or dishwasher.

The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference. A resale price is within the range of income-eligible buyers if it is based upon what a household with a size which equals the number of bedrooms plus one and an income 10 percent below the relevant income limit can afford when spending no more than 30 percent of gross income on housing costs (mortgage, real estate taxes, home and private mortgage insurance, and condo fees), assuming current interest rates offered plus one quarter percent for a 30 year, no point fixed-rate loan with a down payment of five percent of total costs. Units that come up for resale will be targeted to low-income first-time homebuyers earning up to 80 percent of the Boston-Cambridge-Quincy MA-NH Area Median Income (AMI), as published by the U.S. Department of Housing and Urban Development, for the duration of the HOME Period of Affordability (*see affordability period chart at the beginning of Section 1*) and as consistent with the number of bedrooms in the unit.

With regard to the preservation of affordable rental housing, when providing funding to developers/owners of rental properties, the Town will continue to structure the subsidy as a long-term deferred interest loan, which may be extended if required for continued affordability, and to reserve for the Town a right of first refusal to purchase the property should the owner seek to sell.

### ***Framingham***

The City of Framingham employs a deed restriction to serve as a recapture mechanism for its HOME-funded downpayment assistance and housing rehabilitation programs. The Period of Affordability Chart identified in the beginning of Section 1 will apply. For both types of assistance, if the premises are sold, cease to be the mortgagor's primary residence or there is any change in the title during the term of the promissory note, which commences upon the completion date, or the mortgagor is not in substantial compliance with the promissory note and mortgage, the town will recapture the full HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the Mortgagor's investment.

### ***Natick***

The Town of Natick will use the recapture provisions for those housing units that are not intended to be listed on the DHCD Subsidized Housing Inventory (SHI), or do not qualify for the DHCD Local Initiative Program and/or Local Action Units. In these cases, the amount subject to recapture is the amount of the direct subsidy provided to the homeowner, and/or the difference between the fair market value of the property and a reduced sales price attributable to HOME development assistance. The HOME assistance will be recaptured in the full amount of the direct subsidy based on the availability of net proceeds which is defined as the sales price minus superior loan repayment (other than HOME funds) and any closing costs.

For those housing units that are intended to be listed on the DHCD SHI and/or qualify for the DHCD Local Initiative Program or Local Action Unit, the Town of Natick will use the resale provisions to ensure long term affordability. The Period of Affordability outlined at the beginning of Section 1 will apply. In these cases during the HOME period of affordability, the property must remain affordable to low income homebuyers spending no more than 30 percent of gross income on mortgage payments (PITI) and condo fees; and be sold at a price that provides the owner a fair return on investment. The sale of the property is limited to a credit-worthy eligible purchaser earning between seventy and eighty percent (70-80%) of the Area Median Income for an appropriate size household. During the initial 90 days of marketing, the Town will have a Right of First Refusal to purchase the property.

The basis for a fair return on investment includes the homebuyer's original investment and capital improvements and is dependent on a maximum sales price based on the change in Area Median Income (AMI) over the period of ownership. The maximum sales price is determined by taking the ratio of the original HOME assisted unit sales price over the purchase year AMI, and multiplying this number by the current AMI to get the current base sales price, to which is added closing costs and capital improvements. Capital improvements must be approved by the Town to be considered and are defined as a necessary improvement, not covered by a condo or homeowner fee, that if not done would compromise the structural or functional integrity of the original property. The value of capital improvements at the time of resale will be based on a depreciation schedule. The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference.

The City of Waltham enforces a recapture provision on all down payment assistance loans provided through the WestMetro HOME Consortium. If the premises are sold, cease to be the Mortgagor's primary residence or there is any change in the title during the term of the Promissory Note, which commences upon the Completion Date, or the Mortgagor is not in substantial compliance with the Promissory Note and Mortgage, the City will recapture the full

HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the Mortgagor's investment. The City specifically reserves the right to require full repayment, notwithstanding any deficiency in the amount of the net proceeds, in the event that repayment is triggered by a willful violation by the Borrower of the terms of the Note, or the Mortgage or any applicable HOME regulations. This recapture provision conforms to HUD HOME regulation 24 CFR 92.254 (a)(5)(ii). HUD defines the net proceeds as the sales price minus non-HOME loan repayments and closing costs. If the net proceeds are sufficient to repay both the HOME loan and the Borrower's investment (HUD defines Borrower's investment as the Borrower's down payment and any capital improvement investment), the City must recapture the full HOME loan. Please note, however, that when the net proceeds are insufficient to repay the full HOME assistance, the City will not permit the Borrower to recover more than his/her investment.

The Principal sum may be deferred annually by the City based upon annual review by the Lender of the Borrower's compliance with the terms of this Mortgage, the HOME program and HOME project funding agreement and the Promissory Note. The City of Waltham defines capital improvements as a necessary maintenance improvement, not covered by a condominium or homeowners association fee, that if not done would compromise the structural integrity of the property. To be considered a capital improvement, work should meet the following criteria:

- It is not a repair to keep your home in good operating condition.
- It is a new element or replacement of a permanent component of the home, which has reached the end of its useful life.
- It is not part of a common area nor covered by the condominium association fee. This applies to all condo-developed property. (If the condominium or homeowner's association has a special assessment, the City will take into consideration the cost to the homeowner on a case-by-case basis. Additional documentation will be necessary to provide proof of the special assessment.)

Repairs funded by any federal or state or local grant programs are not counted or approved. Improvements such as installation of outdoor decks, additions, garages, and landscaping are luxury improvements and will not be considered as capital improvements.

### ***Newton***

The City of Newton utilizes HOME Program funds for new construction and rehabilitation of homeownership housing, as projects arise. Direct downpayment assistance is provided through local Community Preservation Act funds. Newton uses a resale provision when HOME program funds are used for homebuyer activities, which is incorporated into an affordable housing covenants running with the land. The terms of the resale provision, which apply during the HOME Period of Affordability, are as follows:



*Long-Term Affordability.* All HOME-assisted units must be sold only to a buyer whose family qualifies as a low-income family earning up to 80 percent of the Boston-Cambridge-Quincy MA-NH Area Median Income (AMI), as published by the U.S. Department of Housing and Urban Development, for the duration of the HOME Period of Affordability. If an eligible buyer is not identified within the allotted resale timeframe the City may exercise a purchase option to ensure that the HOME-assisted unit is resold to a low-income family.

*Principal Residence Requirement.* The initial purchaser, and all subsequent buyers of a HOME-assisted unit, must use the property as his/her/their principal residence. Newton conducts annual monitoring to ensure this requirement is met.

*Resale Price & Fair Return on Investment.* If the HOME-assisted unit is sold by the owner during the HOME Period of Affordability, the resale price is calculated as the percentage change of 80 percent of the AMI, as published by HUD, during the term of ownership by the homeowner, plus approved Capital Improvements depreciated over the course of their usual life.

*Calculating Fair Return on Investment.* Fair Return on Investment is calculated by multiplying the initial purchase price of the HOME-assisted unit by a fraction, the numerator of which is 80 percent of the AMI as published by HUD as of the date of receipt of the owner's notice to sell the affordable unit (Conveyance Notice) and the denominator of which is 80 percent of the AMI as published by HUD as of the date of the initial closing, plus approved Capital Improvements, depreciated over the course of their useful life. The original homeowner's investment (e.g. any downpayment) is included as part of the initial purchase price.

*Capital Improvements.* Capital Improvements are elements which may add to the value of the unit or prolong its useful life, are of function and quality consistent with comparable affordable housing units, and are owned solely by the owner (not part of any common areas). Maintenance is not considered a capital improvement. The City must approve all capital improvements prior to costs being incurred. These approved capital improvements are subject to depreciation based on the remaining useful life of the element at time of resale. Improvements that are funded by federal, state or local grant programs are not eligible. Some examples of capital improvements include the replacement of non-operational heating or hot water systems, built-in appliances, installation of energy-efficient windows, and insulation.

*Continued Affordability to Homebuyers.* In accordance with the HOME regulations, Newton is obligated to ensure that the owner of a HOME-assisted unit receives a Fair Return on Investment and that the unit remains affordable to a range of income eligible households upon resale. To

maintain continued affordability, the City will target subsequent purchase to appropriately-sized households earning between 70 and 80 percent of the AMI spending no more than 35 percent of gross household income on fixed housing costs (principal, interest, property taxes, condominium fees, if applicable, and insurance), assuming current interest rates offered plus one quarter percent for a 30-year, fixed rate loan and a downpayment of 5 percent. If the resale price exceeds what an eligible household can afford, the City will subsidize the difference with downpayment assistance, mortgage buydown, or other subsidy, as appropriate. To be considered eligible, homebuyers will also be subject to an asset limit of \$75,000. However, any assets up to \$200,000 from the sale of a Newton residence shall be excluded from that determination (but still considered in determination of income eligibility) provided that:

- (a) the sellers must have been no less than 62 years old at the time of that sale; and
- (b) the sale of the residence must be an arms-length transaction.

### ***Waltham***

The City of Waltham enforces a recapture provision on all Down Payment assistance loans that it has provided through the WestMetro HOME Consortium. If the premises are sold, cease to be the Mortgagor's primary residence or there is any change in the title during the term of the Promissory Note, which commences upon the Completion Date, or the Mortgagor is not in substantial compliance with the Promissory Note and Mortgage, the City will recapture the full HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the Mortgagor's investment. The City specifically reserves the right to require full repayment, notwithstanding any deficiency in the amount of the net proceeds, in the event that repayment is triggered by a willful violation by the Borrower of the terms of the Note, or the Mortgage or any applicable HOME regulations. This recapture provision conforms to HUD HOME regulation 24 CFR 92.254 (a)(5)(ii). HUD defines the net proceeds as the sales price minus non-HOME loan repayments and closing costs. If the net proceeds are sufficient to repay both the HOME loan and the Borrower's investment (HUD defines Borrower's investment as the Borrower's down payment and any capital improvement investment), the City must recapture the full HOME loan. Please note, however, that when the net proceeds are insufficient to repay the full HOME assistance, the City will not permit the Borrower to recover more than his/her investment.

The Principal sum may be deferred annually by the City based upon annual review by the Lender of the Borrower's compliance with the terms of this Mortgage, the HOME Program and HOME Project funding agreement and the Promissory Note. The City of Waltham defines capital improvements as a necessary maintenance improvement, not covered by a condominium or homeowners association fee, that if not done would compromise the structural integrity of the property. To be considered a capital improvement, work should meet the following criteria:

- It is not a repair to keep your home in good operating condition.
- It is a new element or replacement of a permanent component of the home, which has reached the end of its useful life.
- It is not part of a common area nor covered by the condominium association fee. This applies to all condo-developed property. (If the condominium or homeowner's association has a special assessment, the City will take into consideration the cost to the homeowner on a case-by-case basis. Additional documentation will be necessary to provide proof of the special assessment.)

Repairs funded by any federal or state or local Grant Programs are not counted or approved. Improvements such as installation of outdoor decks, additions, garages, and landscaping are luxury improvements and will not be considered as capital improvements.

**Watertown**

Watertown, on any new projects using HOME funds, through the Watertown Housing Partnership, will use the Massachusetts Department of Community Development and Housing's Capital Improvements Policy and Procedures. Watertown uses a recapture provision which requires the HOME loan recipient to repay the loan, and, in some cases, a pre-payment penalty and a share in the appreciation in the project from the proceeds of the sale. The Period of Affordability Chart identified in the beginning of Section 1 will apply.

**2. A description of the guidelines for resale or recapture that ensures the affordability of units acquired with HOME funds? See 24 CFR 92.254(a)(4) are as follows:**

For those communities that have utilized HOME funds for homebuyer and homeownership activities, program participants are required to occupy the property acquired with assistance through the program as their principal residence for the duration of the Affordability Period, in accordance with **24 CFR 92.254(a)(4)**. The Affordability Period is determined by the amount of HOME financial assistance provided to the program participant, as detailed in the table below.

<b>Downpayment/Homebuyer</b>	<b>Affordability Period</b>
Less than \$15,000	Five (5) Years
\$15,000 - \$40,000	Ten (10) Years
Over \$40,000	Fifteen (15) Years

Period of Affordability Chart

***Bedford, Concord, Lexington, Needham, Sudbury, and Wayland***

These communities choose not to utilize HOME funds for newly constructed ownership units due to the conflicts between the State's affordable housing deed riders and the HOME Program rule, with respect to the resale and recapture provisions. This guideline has not changed since the submission of the FY16-20 Consolidated Plan.

***Brookline***

When providing homebuyer assistance, that is, funding directly to a homebuyer to purchase an existing unit at a market price, the Town will continue to pursue two different strategies.

- (1) If the unit is located in a property with fewer than six units, at the time of resale, the seller will repay to the Town the down payment assistance provided plus that portion of the net appreciation, if any (current market price minus original sales price, appraisal fee, if any, brokerage fee up to five percent of resale price, and the depreciated cost of approved capital improvements) which reflects the proportion of public subsidy to total equity invested. Total equity consists of Town homebuyer assistance, owner down payment, owner pay-down of principal and, for consistency with HUD requirements, the cost of capital improvements referenced earlier. In no case will the owner be required to repay the Town more than the net proceeds for the sale, that is, the sales price minus non-HOME loan repayment and sale-related and closing costs.
- (2) If the unit is in a property with six or more units, the Town will have a right of first refusal at a price which represents the original purchase price, minus the subsidy, adjusted by changes in AMI or 80 percent of median income, whichever is lower, plus compensation for the depreciated cost of approved capital improvements, plus the amount in the condominium association's segregated capital replacement account attributable to the unit. In the event that the Town cannot exercise its rights, the seller will be free to sell on the market and repay the loan with shared appreciation in accordance with (1), above.

The Town will continue to use the Commonwealth of Massachusetts' Affordable Housing Deed Rider as a resale restriction for units which are offered – through inclusionary zoning, the State Chapter 40B program and/or various non-HOME subsidies. According to this deed rider, resale price is based upon increases over time in Area Median Income, adjusted by the commercially reasonable cost of approved capital improvements, depreciated over the remaining years of the owner's occupancy, as long as the price at resale is neither more than what a range of income-eligible buyers can afford nor less than the owner's initial purchase price.

However, where HOME funds are provided to a developer in order to acquire and rehabilitate or build new units for sale at affordable prices, the Town will use a resale agreement running with the land that will provide the owner with a fair return on investment, while assuring that the unit will be affordable to a range of income-eligible buyers at least through the HOME period of affordability. Resale price will be the initial sales price plus the commercially reasonable cost of approved capital improvements depreciated over the remaining years of the owner's occupancy, plus return on investment. Investment will be defined as the original downpayment, annual contributions to principal, and commercially reasonable cost of approved capital improvements. Return on investment will be calculated as the sum of the annual interest on the owner's cumulative investment (without compounding), based on the interest rate of ten-year bond obligations of the United States Treasury.

With regard to repayment for capital improvements, capital improvements must be approved beforehand, and be of function and quality (or be so valued) consistent with the use of the housing as affordable housing. The capital improvements are those owned by the condominium owner (and not part of common space) and might include, for example, the replacement, due to damage or long term wear and tear, of windows, heating or hot water systems, and stove, refrigerator or dishwasher.

The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference. A resale price is within the range of income-eligible buyers if it is based upon what a household with a size which equals the number of bedrooms plus one and an income 10 percent below the relevant income limit can afford when spending no more than 30 percent of gross income on housing costs (mortgage, real estate taxes, home and private mortgage insurance, and condo fees), assuming current interest rates offered plus one quarter percent for a 30 year, no point fixed-rate loan with a down payment of five percent of total costs. Units that come up for resale will be targeted to low-income first-time homebuyers earning up to 80 percent of the Boston-Cambridge-Quincy MA-NH Area Median Income (AMI), as published by the U.S. Department of Housing and Urban Development, for the duration of the HOME Period of Affordability (*see affordability period chart outlined above*) and as consistent with the number of bedrooms in the unit.

With regard to the preservation of affordable rental housing, when providing funding to developers/owners of rental properties, the Town will continue to structure the subsidy as a long-term deferred interest loan, which may be extended if required for continued affordability, and to reserve for the Town a right of first refusal to purchase the property should the owner seek to sell.

**Framingham**

In Framingham, HOME-assisted units must meet the affordability requirements of five to 20 years beginning after project completion (*Please see affordability period chart outlined above*). The affordability requirements apply without regard to the term of any loan or mortgage or the transfer of ownership. They are imposed by deed restrictions approved by HUD. The deeds are structured to recapture funds when the following circumstances occur:

- If the premises are sold
- Cease to be the client's primary residence
- Any change in the title during the term of the promissory note, which commences upon the completion date
- Substantial non-compliance with the promissory note and mortgage by the client

When triggered, recaptures take back the full HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the client's investment.

**Natick**

The Town of Natick will use the recapture provisions for those housing units that are not intended to be listed on the DHCD Subsidized Housing Inventory (SHI), or do not qualify for the DHCD Local Initiative Program and/or Local Action Units. In these cases, the amount subject to recapture is the amount of the direct subsidy provided to the homeowner, and/or the difference between the fair market value of the property and a reduced sales price attributable to HOME development assistance. The HOME assistance will be recaptured in the full amount of the direct subsidy based on the availability of net proceeds which is defined as the sales price minus superior loan repayment (other than HOME funds) and any closing costs.

For those housing units that are intended to be listed on the DHCD SHI and/or qualify for the DHCD Local Initiative Program or Local Action Unit, the Town of Natick will use the resale provisions to ensure long term affordability. The Period of Affordability outlined at the beginning of Section 1 will apply. In these cases during the HOME period of affordability, the property must remain affordable to low income homebuyers spending no more than 30 percent of gross income on mortgage payments (PITI) and condo fees; and be sold at a price that provides the owner a fair return on investment. The sale of the property is limited to a credit-worthy eligible purchaser earning between seventy and eighty percent (70-80%) of the Area Median Income for an appropriate size household. During the initial 90 days of marketing, the Town will have a Right of First Refusal to purchase the property.

The basis for a fair return on investment includes the homebuyer's original investment and capital improvements and is dependent on a maximum sales price based on the change in Area

Median Income (AMI) over the period of ownership. The maximum sales price is determined by taking the ratio of the original HOME assisted unit sales price over the purchase year AMI, and multiplying this number by the current AMI to get the current base sales price, to which is added closing costs and capital improvements. Capital improvements must be approved by the Town to be considered and are defined as a necessary improvement, not covered by a condo or homeowner fee, that if not done would compromise the structural or functional integrity of the original property. The value of capital improvements at the time of resale will be based on a depreciation schedule. The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference.

***Newton***

Under resale provisions, all properties acquired through a development subsidy or receiving direct homebuyer assistance with HOME funds will have a recorded deed restriction stating the affordability period and the process for calculating the resale amount to ensure long term affordability to an income-eligible household during the affordability period. Additionally, any loan issued by the City is secured by a mortgage and promissory note.

***Waltham***

Under recapture provisions, all properties receiving direct homebuyer assistance and/or rehabilitated with HOME funds will have a recorded mortgage stating the affordability period (*outlined above*) and the process for calculating the recapture amounts.

***Watertown***

Under recapture provisions, all properties receiving direct homebuyer assistance with HOME funds will have a recorded mortgage stating the affordability period (*outlined above*) and the process for calculating the recapture amounts.

**3. Plans for using HOME funds to refinance existing debt secured by multifamily housing that is rehabilitated with HOME funds along with a description of the refinancing guidelines required that will be used under 24 CFR 92.206(b), are as follows:**

No communities have plans to refinance existing debt secured by properties that have HOME funds in FY19 (FFY18)

**Emergency Solutions Grant (ESG)  
Reference 91.220(l)(4)**

- 1. Include written standards for providing ESG assistance (may include as attachment) In accordance with federal regulations set forth in 24 CFR Part 567, the City of Newton's Department of Planning and Development has developed written standards guiding the provision and prioritization of Emergency Solutions Grant (ESG) funding.**

Service providers contracted with the City of Newton to provide services in conjunction with the Emergency Solutions Grant must become thoroughly familiar with all regulations promulgated by the United States Department of Housing and Urban Development (HUD) governing the Emergency Solutions Grant Program and the City of Newton's written standards. All sub-grantees are responsible for implementing the service in accordance with these regulations.

*(Please also see Written Standards for the Provision of ESG Assistance in the appendix)*

- 2. If the Continuum of Care has established centralized or coordinated assessment system that meets HUD requirements, describe that centralized or coordinated assessment system.**

Coordinated Entry refers to the process used to assess and assist in meeting the housing needs of people experiencing homelessness. This process is intended to serve people experiencing homelessness with ties to the communities of the Balance of State (BoS) Continuum of Care (CoC). BoS Coordinated Entry aims to allocate assistance as effectively as possible in order to meet consumer housing needs including, fostering increased collaboration between service providers, avoiding duplication of services, assessing and prioritizing based on vulnerability, and reducing the amount of time individuals experiencing homelessness must wait before accessing assistance. All individuals identifying as homeless are evaluated, regardless of initial residency, by outreach workers and service providers through centralized intake. CE staff then work to connect individual(s) to appropriate services and programming.

- 3. Identify the process for making sub-awards and describe how the ESG allocation available to private nonprofit organizations (including community and faith-based organizations).**

The distribution of Emergency Solutions Grant funding to sub-recipients is determined



through a competitive, annual RFP process. Division staff also consults with sub-recipients as to their programs and funding needs. The RFP requires the respondents to indicate how their programs will assist homeless individuals and families or those at risk of homelessness in each of these areas, as well as how the programs will help clients achieve housing stability.

In advance of the distribution of the initial FY19 (FFY18) RFP, the Brookline-Newton-Waltham-Watertown local providers and BoS representation met to deliberate and approve allocation percentages across eligible program components helping homeless individuals and families and those at-risk of becoming homeless. These components include Shelter Operations/Services, Rapid Re-housing, and Homelessness Prevention. The CoC's recommendation strikes a balance between funding existing shelter services and outreach activities and focusing resources on HUD's long-term priorities of homelessness prevention and rapid re-housing. These principles align with the BoS' and US Interagency Council on Homelessness' Strategic Plans to End Homelessness.

**4. If the jurisdiction is unable to meet the homeless participation requirement in 24 CFR 576.405(a), the jurisdiction must specify its plan for reaching out to and consulting with homeless or formerly homeless individuals in considering policies and funding decisions regarding facilities and services funded under ESG.**

To the extent possible, outreach is made to residents who have experienced homelessness. The Point-In-Time Count (sheltered and unsheltered) and the Housing Inventory Count are now managed by the BoS. The BoS develops a survey to determine demographic information about this vulnerable population, as well as specific reasons for why someone is homeless and/or, whenever possible, what services may be needed to improve his/her situation in the future.

In addition, the representatives of the four municipalities and local homelessness providers meet annually to determine the percentage allocation for each category of eligible services: Shelter Operations/Services, Rapid Re-housing, Homelessness Prevention, and Street Outreach. Agency staff have direct contact with potential beneficiaries, as well as long track records of providing services directly to the homeless and at-risk homelessness populations, and their work specifically informs this allocation.

**5. Describe performance standards for evaluating ESG.**

Prior to the review and release of the RFP, City staff evaluates the uses and outcomes of existing ESG funded projects should the providers choose to re-apply for funds for the upcoming fiscal year. This is accomplished through the analysis of reports of monitored

programs, as well as a review of quarterly performance reports that are submitted during the grant year. The RFP is also be evaluated with the assistance of a quantitative scoring sheet and an independent review committee.

As allocations are increasingly becoming more data-driven, ESG and CoC service providers must navigate the Efforts to Outcomes (ETO) HMIS system, or the DV equivalents, to input client intake/exit information and ensure accurate data compilation and reporting. Beginning in October 2017, ESG recipients were required to submit this accomplishment data into the Sage HMIS Reporting Repository. The ESG-CAPER Annual Reporting Tool (eCart), used the past two program years, will no longer be used for this process.

**UNIQUE GRANTEE APPENDIX**

**CITY OF NEWTON & WESTMETRO HOME CONSORTIUM**

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**Grantee Unique Appendices  
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## **APPENDIX: CITIZEN PARTICIPATION PLANS**

# CITIZEN PARTICIPATION PLAN

## CITY OF NEWTON HOUSING AND COMMUNITY DEVELOPMENT PROGRAM

*REVISED MARCH 2018*

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The City of Newton annually receives Community Development Block Grant (CDBG), HOME Investment Partnerships Program (HOME) and Emergency Solutions Grant (ESG) funds from the U.S. Department of Housing and Community Development (HUD), which it administers through the Housing and Community Development Division of the Planning and Development Department. The primary purpose of these formula grant programs is to develop viable communities through the provision of decent housing, a suitable living environment and expanding economic opportunities for low- and moderate-income persons. As a recipient of these entitlement program funds, the City is required to produce the following documents:

- **Consolidated Plan** – a five-year plan that documents Newton’s housing and community development needs, outlines strategies to address those needs, and identifies proposed program accomplishments
- **Annual Action Plan** – an annual plan that describes specific CDBG-, HOME- and ESG-funded projects that will be undertaken over the course of the upcoming fiscal year
- **Consolidated Annual Performance and Evaluation Report (CAPER)** – an annual report that evaluates the use of CDBG, HOME and ESG funds following the close of the fiscal year
- **Analysis of Impediments to Fair Housing Choice** – a five-year plan that analyzes disparities in access to housing opportunities in the City and identifies priorities and goals to address these issues.

This Citizen Participation Plan has been developed to provide citizens and other interested parties with opportunities to participate in an advisory role in the planning, implementation and evaluation of the CDBG, HOME and ESG programs which primarily benefit Newton’s low- and moderate-income residents, and to review and comment on each of the documents listed above.

Citizen participation in CDBG, HOME and ESG program activities ranges from conducting needs assessments and strategic planning to providing input on project selection, development, implementation and evaluation. The Citizen Participation Plan outlines the City’s responsibility to solicit active citizen participation. The goals of the Citizen Participation Plan are to:

- Encourage citizen participation by all Newton residents, emphasizing the involvement of low- and moderate-income residents, persons with disabilities, minorities, non-English speaking persons and residents of assisted housing;
- Inform citizens of the Newton Consolidated Plan, CAPER, the Analysis of Impediments to Fair Housing Choice and the Annual Action Plan, including funds available from CDBG, HOME, ESG and other Continuum of Care Homeless Programs and eligible activities under these programs;
- Give all citizens an opportunity to identify and respond to priority needs;
- Give all citizens an opportunity to identify and respond to proposed projects, actions, policies and the use of funds; and
- Give all citizens an opportunity to review and comment on program performance.

## **1. Process for Citizen Participation**

Opportunities for citizen participation in the planning and development of the Newton Consolidated Plan, Analysis of Impediments to Fair Housing Choice, the Annual Action Plan, and the CAPER will be provided through several levels of community involvement and outreach, including:

### Individual Citizens

The participation of individual citizens is critical to the City of Newton's Housing and Community Development Program. Reasonable efforts will be employed to make all citizens aware of the Program-related meetings and events in their neighborhoods, as well as public hearings and citywide events that are related to the development of the Consolidated Plan, the Analysis of Impediments to Fair Housing Choice, the Annual Action Plan and the CAPER. It is the goal of the Program to create opportunities for participation for all interested citizens, including, but not limited to, low- and moderate-income residents, persons with disabilities, minorities, non-English speaking persons and residents of assisted housing.

### Fair Housing Committee

The Fair Housing Committee works with the Mayor and City staff to promote, support and affirmatively further Newton's efforts to be a diverse and welcoming community with housing choices and opportunities free from housing discrimination. Acting in an advisory capacity to the Mayor, the City Council, and all applicable City departments, boards, and committees, this Committee aims to assure that policies and practices relating to fair housing are incorporated into City operations and community activities, as well as facilitate public education and outreach. The committee collaborates with City staff to spearhead the community participation process for the Analysis of Impediments to Fair Housing Choice, which will be completed once every five years. The Committee's bylaws allow the Mayor to appoint up to 11 members and residents, who represent Newton-based institutions, organizations, and businesses that serve the housing needs of Newton residents. The membership shall reflect the diversity of persons who are protected by civil rights laws, and shall include one or more persons with expertise in fair housing and civil rights laws.

### Commission on Disability

The mission of the Commission on Disability (COD) is to foster equal access to community life and activities for people with disabilities. Through education and advocacy, the Commission works with the Mayor and City staff to raise awareness about the needs of people with disabilities and the importance of increased accessibility to programs, housing and facilities in municipal and commercial buildings, and other public entities. The COD informs project priorities and provides recommendations for use of Community Development Block Grant (CDBG) funds in projects that remove architectural barriers and increase accessibility throughout the City of Newton. Commission members are a diverse representation of Newton's disability population and include residents, representatives of organizations, as well as businesses and institutions, which are based in Newton and serve the needs of Newton residents. The COD consists of not less than 5 but no more than 9 members appointed by the Mayor.

### Organizations, Agencies and the Newton Housing Authority

In developing a plan for the best use of CDBG, HOME and ESG funds, the Newton Housing and Community Development Program relies heavily on the input of other agencies involved in the

development and implementation of projects to assist low- and moderate-income citizens, including the Newton Housing Authority, the Balance of State (BoS) Continuum of Care (CoC), many area nonprofit organizations and state housing and community development agencies. These agencies and organizations are encouraged to participate in the development of the Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER and are asked to review and comment on the proposed documents.

#### Planning and Development Board

The Planning and Development Board, acting as the Community Development Board, is the governing citizen body that considers the recommendations made by Division staff and City departments, other Newton agencies and organizations and citizens related to the CDBG, HOME and ESG Programs. Following a public hearing to allow for open discussion, the Planning and Development Board forwards their recommendations to the Mayor for final review and approval. When funding requests are made to the Planning and Development Board (while acting as the Community Development Board), representatives of the party requesting project funding and/or Division staff will present the proposal to the Board. The Public Hearing is held open during the 15- or 30-day comment period to ensure that public comments made during that timeframe are adequately considered by the Board before a final funding decision is made by the Mayor.

Public hearings on the proposed Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER are conducted by the Board, as well as public hearings for proposed substantial amendments to the Consolidated Plan and/or Annual Action Plan. The Board is composed of residents of the City of Newton and is comprised of six full members (one of which is appointed by the state Secretary of Housing and Community Development), the Planning and Development Department Director (*ex officio*), and up to five alternate members. Unless their schedule is disrupted by a holiday or inclement weather, the Planning and Development Board meets on the first Monday of every month at Newton City Hall.

#### City Council

The City Council is the final citizen policy body that reviews and takes action on the Consolidated Plan and the Annual Action Plan. After receiving the plan from the Mayor, the City Council considers and then votes on approval of the submission of the proposed Plan and on acceptance of the CDBG, HOME and ESG grants from HUD. After the City Council votes, the Plan can be formally submitted to HUD.

## **2. Public Meetings and Public Hearings**

Committees including, but not limited to, the Fair Housing Committee, COD and local meetings of the BoS CoC, conduct public meetings to solicit public input on the Housing and Community Development Program. All meetings are open to the public and participation is encouraged.

Public hearings are required by law in order to obtain the public's views and to provide the public with the City's responses to public questions and proposals. As stated earlier, the entity responsible for conducting public hearings for the Newton Housing and Community Development Program is the Planning and Development Board. As required by law, the Planning and Development Board holds at



least two public hearings each year to solicit input on housing and community needs, to review proposed uses of funds and to assess how funds were spent during the previous program year.

The two public hearings are:

- Proposed Annual Action Plan public hearing (generally held in March or April)
- Annual performance public hearing for the proposed CAPER (generally held in September)

During the development of the Consolidated Plan and the Analysis of Impediments to Fair Housing Choice additional public hearings will be held.

The public hearings for the Consolidated Plan will cover:

- Proposed Citizen Participation Plan public hearing, where staff present proposed revisions to the existing Citizen Participation Plan;
- Needs Assessment public hearing for the Consolidated Plan, where staff describe the housing and community development needs that were identified through data analysis and community participation;
- Proposed Consolidated Plan public hearing, where staff reviews the content of the draft Consolidated Plan, including the amount of financial assistance the City expects to receive, the proposed projects that will be undertaken and the activities that will benefit low- and moderate income persons.

The public hearing for the Analysis of Fair Housing to Fair Housing Choice will cover:

- Disparities in housing opportunity that were identified through data analysis and community participation.
- Content, goals and strategies of the draft Analysis of Impediments to Fair Housing Choice.

In addition to the public hearings listed above, the Planning and Development Board will conduct a public hearing whenever a substantial change is proposed to the use of CDBG, HOME or ESG Program funds from that which was listed in the Consolidated Plan or Annual Action Plan.

A substantial Amendment is defined, in accordance with 24 CFR 91.505(a), as:

- A substantial change in allocation priorities (any change greater than 25 percent in an individual project's total budget) or a substantial change in the method of distribution of funds;
- A new activity (including those funded exclusively with program income) not previously covered by the Newton Consolidated Plan or Annual Action Plan; or a
- Substantial change in the purpose, scope, location or beneficiaries of an activity.

Public hearings are generally held at Newton City Hall and in locations that meets ADA accessibility standards. Reasonable accommodations will be made for people with disabilities upon request. Language interpreters will also be provided for non-English speaking participants upon advance notice.

Citizens and other interested parties may present oral comments at the time of the hearing and/or submit written comments for 30 days after the public hearing for the proposed Consolidated Plan, Annual Action Plan, Analysis of Impediments to Fair Housing Choice and any substantial or material

changes and for 15 days after public hearings for the proposed Citizen Participation Plan and the CAPER. The City will consider the views of all citizens, organizations and agencies, and other interested groups in preparing the final Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER.

### **3. Notice of Meetings**

All public meetings and public hearings are open to the public. Participation is encouraged. The following paragraphs describe the efforts that will be made to notify the public of public meetings and public hearings.

#### Public Meetings

Meeting notices are mailed or e-mailed to appointed members at least seven calendar days prior to meeting date. All meeting notices are posted on the Electronic Posting Board and Public Notice Board on the first floor of Newton City Hall within 48 hours of the scheduled meeting, and are listed in the Planning and Development Department's weekly "Friday Report," which is e-mailed or mailed to City officials, agency/organization representatives and residents.

#### Public Hearings of the Planning and Development Board

- Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER

Public notices for public hearings for the proposed Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER will be advertised in the *Newton TAB* at least ten calendar days prior to each hearing. Meeting notices for the Consolidated Plan, Annual Action Plan, and CAPER will be e-mailed or mailed to Board members and posted on the Electronic Posting Board, the City webpage relevant to the subject matter (i.e. <http://www.newtonma.gov/fairhousing> ), and the Public Notice Board, and broadcast on the television monitor, both located on the first floor of City Hall. Notice will also be provided on the City's website in the City Calendar and listed in the Planning and Development Department's weekly "Friday Report" which is e-mailed or mailed to City officials, agency/organization representatives and residents.

- Amendments to the Proposed Use of Funds

Notices for public hearings for amendments to the use of funds proposed in the Consolidated Plan and/or Annual Action Plan will be e-mailed or mailed to Board members. Notice will also be posted on the Electronic Posting Board, the Public Notice Board and broadcast on the television monitor on the first floor of City Hall. Notice will also be provided on the City's website in the City Calendar and listed in the Planning and Development Department's weekly "Friday Report" which is e-mailed or mailed to City officials, agency/organization representatives and residents.

### **4. Availability of the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER**

Notice of the availability of the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER will be published in the *Newton TAB* at least ten calendar days prior to the public hearing. The notice will summarize the content and purpose of these proposed documents and will include a list of locations where copies of the

documents may be examined. At a minimum, copies of the proposed Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER will be available in the Newton Housing and Community Development Office and on the Housing and Community Development Division’s section of the Planning and Development Department’s web page, located at <http://www.newtonma.gov/cdbg> and on the Planning and Development Department’s Special Reports and Studies web page: [http://www.newtonma.gov/gov/planning/resources/special\\_reports\\_n\\_studies.asp](http://www.newtonma.gov/gov/planning/resources/special_reports_n_studies.asp).

**5. Access to Information**

In addition to opportunities to make oral comments at public meetings and/or public hearings before the Planning and Development Board, any citizen, organization, agency or other interested party may submit written requests for information and submit written comments regarding the proposed Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER, and/or amendments to each, including the proposed use of funds and the benefit to low- and moderate-income residents. Copies of documents will be made available in other languages and/or in other formats (i.e. larger print) upon request. Documents from prior years will also be available upon request for at least the preceding five years.

Additionally, plans to minimize displacement and assist those displaced as a result of the activities in the Consolidated Plan and the Annual Action Plan are attached to this document.

**6. Comments**

Citizens, organizations, agencies and other interested parties are encouraged to submit their comments on the proposed Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER. All comment periods will begin the day of the public hearing held by the Planning and Development Board. Minimum comment periods are listed below:

Type of Public Hearing	Comment Period
Consolidated Plan	30 calendar days
Annual Action Plan	30 calendar days
CAPER	15 calendar days
Analysis of Impediments to Fair Housing Choice	30 calendar days
Substantial Amendments to Consolidated Plans and Annual Action Plans	30 calendar days

The City of Newton will consider all comments in preparing its final Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER for submission to HUD, and will include a summary of all comments received and the actions taken to address each comment.

Comments may be submitted via mail, e-mail or fax to:

Housing and Community Development Division  
Newton Planning and Development Department  
1000 Commonwealth Avenue  
Newton, MA 02459  
Fax: 617-796-1142  
Phone: 617.796.1120, TDD/TTY 617-796-1089

## **7. Timely Response**

The City of Newton will respond in writing within 15 calendar days to any written comments, questions or complaints received regarding the Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, CAPER or the Newton Housing and Community Development Program in general.

## **8. Technical Assistance**

Upon request, Newton Housing and Community Development Division staff will provide technical assistance to groups representing low- and moderate-income persons to develop funding requests for CDBG-, HOME- or ESG-eligible activities.

## **9. Use of the Citizen Participation Plan**

The City of Newton will be required to adhere to this Citizen Participation Plan, once adopted, as the official mechanism for obtaining citizen input into the Consolidated Plan process and during the administration of the programs covered by this Plan.

## **10. Jurisdiction Responsibility**

The requirements for citizen participation shall not restrict the responsibility or authority of the jurisdiction for the development and execution of its Consolidated Plan. The sole and final responsibility and authority to make determinations regarding the City's CDBG, HOME and ESG funding rests exclusively with the Mayor.

## **ANTI-DISPLACEMENT AND RELOCATION PLAN**

(attached to the Citizen Participation Plan)

### **Permanent Relocation**

It is the policy of the City of Newton Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) programs and the WestMetro HOME Consortium to take all reasonable steps to minimize displacement as a result of CDBG- and HOME-assisted projects, including:

- Considering whether displacement will occur during feasibility determinations
- Identifying potential relocation workload and resources early
- Assuring, whenever possible, that residential occupants of buildings rehabilitated are offered an opportunity to return
- Planning rehabilitation projects to include “staging” where this would eliminate temporary displacement
- Following notification procedures carefully so that families do not leave because they are not informed about planned projects or their rights

When a project does require relocation, in order to ensure the timely issuance of information notices to displaced households, etc., staff of the City of Newton Housing and Community Development Division or of the WestMetro HOME Consortium member communities will ensure that all notices are sent in compliance with the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA).

### **Temporary Relocation**

Temporary relocation often occurs as the result of lead abatement and other rehabilitation activities in renter- and owner-occupied units. Although the City of Newton Housing and Community Development Division is not required to, in most cases it pays for the temporary relocation of displaced renters and/or homeowners whose residences are being rehabilitated.

# **CITIZEN PARTICIPATION PLAN**

## **WESTMETRO HOME CONSORTIUM CITIZEN PARTICIPATION PLAN**

### **REVISED MARCH 2018**

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The City of Newton, the lead entity for the WestMetro HOME Consortium, annually receives HOME Investment Partnerships Program (HOME) funds from U.S. Department of Housing and Community Development (HUD), which it administers on behalf of the WestMetro HOME Consortium member communities. The purpose of the HOME Program is to provide funds for a wide range of activities that create affordable housing opportunities for low- and moderate- income people. As a recipient of these formula grant funds, the HOME Consortium is required to produce the following documents:

- Consolidated Plan – a five-year plan that documents each community’s housing needs, outlines strategies to address those needs, and identifies proposed program accomplishments
- Annual Action Plan – an annual plan that describes specific HOME-funded projects that will be undertaken over the course of the upcoming fiscal year
- Consolidated Annual Performance and Evaluation Report (CAPER) – an annual report that evaluates the use of HOME funds
- Analysis of Impediments to Fair Housing Choice – a five-year plan that analyzes disparities in access to housing opportunities and identifies priorities and goals to address these issues.

This Citizen Participation Plan has been developed to provide citizens and other interested parties with opportunities to participate in an advisory role in the planning, implementation and evaluation of the HOME program and to review and comment on each of the documents listed above.

Citizen participation ranges from conducting needs assessments and strategic planning to project selection, development, implementation and evaluation. The Citizen Participation Plan outlines the City’s responsibility for providing opportunities for active citizen participation. The goals of the Citizen Participation Plan are to:

- Encourage citizen participation by all residents of the Consortium-member communities, emphasizing the involvement of low- and moderate-income residents, people with disabilities, minorities and residents of assisted housing;
- Inform citizens of the Consolidated Plan, Analysis of Impediments to Fair Housing Choice, and the Annual Action Plan, including funds available from the HOME program and eligible activities under the program;
- Give all citizens an opportunity to identify and respond to priority needs;
- Give all citizens an opportunity to identify and respond to priority proposed projects and the use of funds; and
- Give all citizens an opportunity to review and comment on program performance.

This is the overall Citizen Participation Plan for the WestMetro HOME Consortium. Member communities must meet the minimum requirements set forth herein. However, members are free to add opportunities for citizen participation beyond those required here.

Please note that the Consortium’s Consolidated Plan and subsequent Annual Action Plans will cover *only* housing planning and HOME programming for the Consortium member communities. The plans will also include Newton’s Community Development Block Grant (CDBG) and Emergency Solutions Grant (ESG)

programs, as well as planning and programming for other programs. The other Consortium members will develop separate *non-housing plans*, as appropriate, and these will be submitted to HUD with the Consortium Plan, but will be separate documents.

## **1. Process for Citizen Participation**

Participation by citizens, agencies and other interested parties in the process of developing the Consortium's Citizen Participation Plan, Consolidated Plan, the Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER and will be encouraged by both the Consortium and by individual member communities. All meetings and draft public documents will receive the broadest possible circulation and notice to encourage participation, especially by residents in the lowest income brackets, by minorities and non-English speaking persons, as well as persons with mobility, visual or hearing impairments. Each member will work with its local public housing authority to encourage the participation of public and assisted housing residents.

Reasonable accommodations will be made for people with disabilities upon request. Language interpreters will be provided for non-English speaking participants upon advance request.

## **2. Public Hearings**

Public participation will be provided at the following public hearings to be held by the Consortium before the Newton Planning and Development Board at Newton City Hall in an accessible location. Hearings may be combined; however, no less than two public hearings will be conducted during the program year.

- Proposed Citizen Participation Plan public hearing
- Proposed Housing Needs public hearing
- Proposed Housing Strategies public hearing
- Proposed Consolidated Plan/Annual Action Plan public hearing
- Annual Performance Public Hearing for the proposed CAPER
- Proposed Analysis of Impediments to Fair Housing Choice public hearing

In addition to the public hearings listed above, member communities will also conduct public hearings in their own community whenever a substantial change is proposed to the use of HOME Program funds from that which was listed in the Consolidated Plan or Annual Action Plan. Member communities shall give notice of the proposed change to the City of Newton, which will submit the required notification to HUD once the hearing has been held and the change has been approved.

A substantial change is defined, in accordance with 24 CFR 91.505(a), as:

- A substantial change in allocation priorities (any change greater than 25 percent in an individual project budget) or a substantial change in the method of distribution of funds;
- An activity (including those funded exclusively with program income) not previously covered by the Consolidated Plan or Annual Action Plan; or a
- Substantial change in the purpose, scope, location or beneficiaries of an activity.

In addition to public hearings for a substantial change, additional hearings may be held by Consortium member communities to solicit input on proposed Plans.

Citizens and other interested parties may present oral comments at the time of the hearing and/or

submit written comments for 30 days after the public hearing for the proposed Consolidated Plan, Analysis to Fair Housing Choice, Annual Action Plan, and any substantial amendments, and for 15 days after public hearings for the proposed Citizen Participation Plan and CAPER. The Consortium will consider the views of all citizens, organizations and agencies, and other interested groups in preparing the final Citizen Participation Plan, Consolidated Plan, Annual Action Plan and CAPER.

### **3. Notice of Meetings**

Public notices for public hearings for the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER and will be advertised in the following newspapers at least ten days prior to each hearing.

#### **Newspaper**

- Newton TAB
- Bedford Minuteman
- Belmont Citizen Herald
- Brookline TAB
- Framingham TAB
- Lexington Minuteman
- Lincoln Journal
- Natick Bulletin
- Needham Times
- Sudbury Town Crier
- Waltham News Tribune
- Watertown TAB & Press
- Wayland Town Crier

Public notices for substantial changes will be advertised in the affected community's newspaper by the affected community at least seven days prior to the hearing.

Additionally, at a minimum, meeting notices for public hearings for the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER will be e-mailed or mailed to Planning and Development Board members and posted on the Electronic Posting Board and Public Notice Board, on the first floor of Newton City Hall within 48 hours of the scheduled meeting. Notice will also be provided on the front page of the City of Newton's website and listed in the Newton Planning and Development Department's weekly "Friday Report" which is e-mailed or mailed to City officials, agency/organization representatives and residents. Consortium member communities may supplement these outreach efforts.

### **4. Availability of the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER**

Notice of the availability of the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, and CAPER will be published in the newspapers listed above at least ten days prior to the public hearing. The notice will summarize the purpose of these proposed documents and will include a list of locations where copies of the documents may be examined. At a minimum, copies of the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER will be available in the Newton Housing and Community Development Office and on the Housing and on the Community Development Division's section of the Newton Planning and Development Department's web page, located



at <http://www.newtonma.gov/gov/planning/hcd/default.asp>

## 5. Access to Information

In addition to opportunities to make oral comments at public hearings before the Newton Planning and Development Board, any citizen, organization, agency or other interested party may submit written requests for information and submit written comments regarding the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice,, Annual Action Plan and CAPER, and amendments to each, including the proposed use of funds and the benefit to low- and moderate-income residents. Copies of documents will be made available in other languages and/or in other formats (i.e. larger print) upon request. Documents from prior years will also be available upon request for at least the preceding five years.

Additionally, plans to minimize displacement and assist those displaced as a result of the activities in the Consolidated Plan and the Annual Action Plan are attached to this document.

## 6. Comments

Citizens, organizations, agencies and other interested parties are encouraged to submit their comments on the proposed Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER. All comment periods will begin the day of the public hearing held by the Newton Planning and Development Board. Minimum comment periods are listed below:

TYPE OF PUBLIC HEARING	COMMENT PERIOD
Consolidated Plan	30 calendar days
Analysis of Impediments to Fair Housing	30 calendar days
Annual Action Plan	30 calendar days
CAPER	15 calendar days
Substantial Changes	30 calendar days

The City of Newton, on behalf of the Consortium and working with member communities, will consider all comments in preparing its final Citizen Participation Plan, Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan and CAPER for submission to HUD, and will include a summary of all comments received and the actions taken to address each comment.

Comments may be submitted via mail, e-mail or fax to:

Rachel Powers, Community Development Program Manager  
Newton Housing and Community Development Program  
Planning and Development Department  
1000 Commonwealth Avenue  
Newton, MA 02459  
E-mail: [rpowers@newtonma.gov](mailto:rpowers@newtonma.gov)/ Fax: 617-796-1142

## **7. Timely Response**

The City of Newton, on behalf of the Consortium and working with member communities, will respond in writing within 15 days to any written comments, questions or complaints received regarding the Consolidated Plan, Analysis of Impediments to Fair Housing Choice, Annual Action Plan, CAPER or the HOME Program in general.

## **8. Technical Assistance**

Upon request, Consortium staff will provide technical assistance to groups representing low- and moderate-income persons to develop funding requests for HOME-eligible activities.

## **9. Use of the Citizen Participation Plan**

The City of Newton and the HOME Consortium member communities will be required to adhere to this Citizen Participation Plan, once adopted, as the official mechanism for obtaining citizen input into the Consolidated Plan process and during the administration of the HOME Program covered by this Plan.

## **10. Jurisdiction Responsibility**

The requirements for citizen participation shall not restrict the responsibility or authority of the City of Newton or the HOME Consortium member communities for the development and execution of the Consolidated Plan for the WestMetro HOME Consortium.

## **WESTMETRO HOME CONSORTIUM ANTI-DISPLACEMENT AND RELOCATION PLAN**

### **Permanent Relocation**

It is the policy of the City of Newton Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) programs and the WestMetro HOME Consortium to take all reasonable steps to minimize displacement as a result of CDBG- and HOME-assisted projects, including:

- Considering whether displacement will occur during feasibility determinations
- Identifying potential relocation workload and resources early
- Assuring, whenever possible, that residential occupants of buildings rehabilitated are offered an opportunity to return
- Planning rehabilitation projects to include “staging” where this would eliminate temporary displacement
- Following notification procedures carefully so that families do not leave because they are not informed about planned projects or their rights

When a project does require relocation, in order to ensure the timely issuance of information notices to displaced households, etc., staff of the City of Newton Housing and Community Development Division or of the WestMetro HOME Consortium member communities will ensure that all notices are sent in compliance with the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA).

### **Temporary Relocation**

Temporary relocation often occurs as the result of lead abatement and other rehabilitation activities in renter- and owner-occupied units. Although the City of Newton Housing and Community Development Division is not required to, in most cases it pays for the temporary relocation of displaced renters and/or homeowners whose residences are being rehabilitated.

**APPENDIX: PRODUCTION OF AFFORDABLE HOUSING IN NEWTON  
IN FY19**

## Production of Affordable Housing in Newton in FY19

Project Name	Description	Creation Tool	Funding Source	Units
Myrtle Village	The rehabilitation of an existing single-family home into two-units and construction of an attached third unit at 12 Curve Street; and the rehabilitation of an existing two-family unit with construction of two one-story units on either side of the duplex at 18-20 Curve Street. Both existing units are located in the Myrtle Baptist Historic District. The completed project will create a total of seven affordable rental units, including one 1-BR and one 3-BR affordable to households at 50% AMI, two 2-BRs affordable to households at 70% AMI, and two 2-BRs affordable to households at 85% AMI and one 1-BR affordable to households at 85% AMI.	Chapter 40B Comprehensive Permit / DHCD	CDBG, HOME, CPA, Private Funds	7 affordable rental units (2 at 50% AMI, 2 at 70% AMI, 3 at 85% AMI)
83-85 West Street (Newton Housing Authority)	The acquisition and rehabilitation of an existing duplex to create 2 permanently affordable rental housing units affordable to households at 80% AMI.	NHA	CDBG, HOME, Inclusionary Zoning Funds	2 affordable rental units at 80% AMI
28 Austin Street	A mixed-use, mixed-income rental project that will include a total of 68 housing units, including 23 units affordable to households at 80% AMI. This project received a special permit and units will be created through the Inclusionary Zoning Ordinance.	Special Permit / Inclusionary Zoning	Private	23 affordable rental units (at 80% AMI)
Washington Place (875 Washington Street)	A mixed-use, mixed-income rental project that will include a total of 160 housing units, including 24 units affordable to households between 50% and 80% AMI, and 16 middle-income units affordable to households between 80% and 120% AMI. This project will receive a special permit and units will be created through the Inclusionary Zoning Ordinance.	Special Permit / Inclusionary Zoning	Private	24 affordable rental units (between 50% and 80% AMI)

Project Name	Description	Creation Tool	Funding Source	Units
386-394 Watertown Street	A mixed-use, mixed-income rental project that will include a total of 9 housing units, including 2 affordable units: 1 affordable to households at 80% AMI, and 1 affordable to households at 50% AMI. This project received a special permit and units will be created through the Inclusionary Zoning Ordinance.	Special Permit / Inclusionary Zoning	Private	2 affordable rental units (1 at 50% AMI and 1 at 80% AMI)
Langley Road (392-396, 402-404, 400)	A mixed-income rental project that will include 18 new residential units and replace 2 housing units for a total of 20 rental units, including 4 affordable units: 2 affordable to households at 80% AMI, and 2 affordable to households at 50% AMI. This project received a special permit and units will be created through the Inclusionary Zoning Ordinance.	Special Permit / Inclusionary Zoning	Private	4 affordable rental units (2 at 50% AMI and 2 at 80% AMI)
429 Cherry Street	A mixed-income rental project that will include a total of 13 housing units, including 3 affordable units at 65% AMI. This project received a special permit and units will be created through the Inclusionary Zoning Ordinance.	Special Permit / Inclusionary Zoning	Private	3 affordable rental units at 65% AMI
1521 Beacon Street	A mixed-income ownership project that will include a total of 8 housing units, including 2 affordable ownership units: 1 at 65% AMI, and 1 at 80% AMI. This project received a special permit and units will be created through the Inclusionary Zoning Ordinance.	Chapter 40B Comprehensive Permit, MassHousing	Private / New England Fund of Federal Home Loan Bank of Boston	2 affordable ownership units (1 at 50% AMI and 1 at 80% AMI)

Project Name	Description	Creation Tool	Funding Source	Units
Sunrise Assisted Living Facility	<p>An assisted living facility that will include a total of 85 units with 122 beds, including 3 beds at no cost to residents whose incomes do not exceed 80% AMI. These 3 beds shall include attendant services, with at least 45 minutes of care per day. This project received a special permit and the “no cost” beds were negotiated through the Inclusionary Zoning Ordinance requirements.</p>	Special Permit / Inclusionary Zoning	Private	3 assisted living beds at no cost to residents whose incomes do not exceed 80% AMI
70 Crescent Street	<p>A mixed-income rental project that will include a total of 8 housing units, including 6 affordable units: 2 at 50% AMI, 3 at 80% AMI, 1 at 99% AMI and 2 at 120% AMI. This project is being developed by the City, on City-owned land, and is going through the City’s Site Approval Process in lieu of a special permit.</p>	Site Approval Process	CPA, Bond, City Cash	5 affordable rental units (2 at 50% AMI and 3 at 80% AMI)

## **APPENDIX: AP-10 – CONSULTATION**



**AP-10: Consultation for the City of Newton and the WestMetro HOME Consortium**

Agency/Group/Organization Type	Type of Organization	Type of Organization (if serving multiple purposes)	What Section of the Plan was addressed by consultation?	How was the organization consulted?	What are the anticipated outcomes of the consultation or areas for improved coordination?
<b>NEWTON</b>					
Newton Housing Authority	Public Housing Authority	N/A	Public Housing Needs	The Newton Housing Authority (NHA) helped complete sections of the FY19 (FFY18) Action Plan and assisted to inform program development. Division staff reviews NHA's five year plan to ensure it is consistent with the Consolidated Plan on an annual basis.	This collaboration ensures that Newton is helping to create as many affordable housing opportunities as possible.
Citizens for Affordable Housing in Newton Development Organization	Services-housing	Neighborhood Organization	Housing Need Assessment	The Director of CAN-DO has attended several public meetings to discuss various components and priorities for the Consolidated Plan.	
Newton Advisory Committees	Other	N/A	All Needs Assessments; Strategic Plan; Annual Action Plan	The committees meet regularly to provide important input on the needs assessment, priorities and overall strategy of the Consolidated Plan. The Continuum of Care (BoS/BNWW CoC), Commission on Disability and the Fair Housing Committee all play key roles, informing the planning process and implementing the Annual Action Plan and CD activities.	This participation guides staff and local officials on the housing, community and economic development efforts in Newton. Division staff hope to strengthen coordination and collaboration in order to enhance community outputs.
City of Newton City Departments	Municipality	N/A	All Needs Assessments; Strategic Plan; Annual Action Plan	The Housing and Community Development Division regularly coordinate with the Departments of Health and Human Services, Public Works, Engineering, and Parks and Recreation to inform community needs, priorities and overall strategy of the Consolidated Plan.	This high level of coordination is vital in facilitating many of the activities identified in the Annual Action Plan and Consolidated Plan and in ensuring the health, safety and well-being of Newton residents.
Massachusetts Department of Housing and Community Development	Housing	N/A	Housing Need Assessment; Homeless Strategy	The staff at DHCD was involved in reviewing the housing projects/plans for the next five years. Homeless data is collected by DHCD and disbursed to Newton each year. DHCD now administers McKinney-Vento funds for the Brookline-Newton-Waltham-Watertown CoC.	This collaboration ensures that Newton is helping to create as many affordable housing opportunities as possible and addressing homeless needs.
<b>BEDFORD</b>					
Bedford Housing Partnership	Housing	N/A	Housing Need Assessment	Consultation	The anticipated outcomes of the consultation are improved coordination and the inclusion of the organization's input in the Action Plan.
<b>BELMONT</b>					
Belmont Housing Authority	Public Housing Authority	N/A	Public Housing Needs	The Director of the Housing Authority was contacted directly. A member of the Housing Authority sits on the Housing Trust and attends all meetings.	The anticipated outcomes of the consultation include continued outreach by all of those involved in housing and the inclusion of the Housing Authority's input in the Plans.
Belmont Housing Trust	Housing	N/A	Housing Need Assessment	The Trust was involved in reviewing the draft Housing Production Plan. Staff attends meetings and is in regular contact with the Chair.	The anticipated outcomes of the consultation include continued coordination between those involved with housing and the inclusion of the Trust's input in the Plans.
			Market Analysis		
Belmont Health Department	Health Agency	N/A	Housing Need Assessment	The Social Work Coordinator and Veteran Services Agent were contacted directly.	The anticipated outcomes of the consultation include continued coordination between those involved with providing services to those in need and the inclusion of the Health Department's input in the Plans.
			Market Analysis		
Council on Aging	Services-Elderly Persons	N/A	Housing Need Assessment	The Director and the Social Work Coordinator were contacted directly.	The anticipated outcomes of the consultation include continued coordination between those involved with providing services to those in need and the inclusion of the Council on Aging's input in the Plans.
			Market Analysis		
<b>BROOKLINE</b>					
Brookline Housing Advisory Board	Civic Leaders	Housing	Housing Need Assessment/FY19 Annual Action Plan	The Brookline Housing Advisory Board held a public meeting to review and comment upon the FY19 Annual Action Plan.	The anticipated outcomes of the consultation are prioritizing HOME funds.
Brookline Housing Authority	Public Housing Authority	Housing	Public Housing Needs	The BHA was interviewed about public housing needs as well as capital needs for state-owned public housing in FY19 and beyond.	Information helps inform the Town of the BHA's needs as staff coordinate housing resources for new projects as well as preservation of affordable units.
Brookline Planning Department	Town Planning Department	Planning	Strategic Plan	The Department of Planning & Community Development engaged a consultant team to work with a citizen and staff board and develop a Housing Production Plan. The HPP was approved in November of 2016.	The Housing Production Plan will be used to guide the Town's future development for affordable, mixed income, and mixed-use housing over the next decade.
Brookline Health Department	Health Agency	N/A	Housing Need Assessment	The Health Department works with persons with disabilities, homeless, and persons with substance abuse.	The anticipated outcomes of the consultation are improved coordination and the inclusion of the organization's input in the Consolidated Plan and Action Plan.
Brookline Diversity, Inclusion, and Community Relations Department	Service-Fair Housing	N/A	Housing Need Assessment	The Brookline Diversity, Inclusion, and Community Relations Department work on issues of fair housing, diversity, and inclusion.	
Brookline Community Mental Health Center	Services-homeless	Services-Victims of Domestic Violence	Homelessness Strategy	BCMHC provides on-going case management to those experiencing housing problems and homelessness in the Town, as part of the organization's homeless prevention services.	
Brookline Council on Aging	Services-Elderly Persons	N/A	Housing Need Assessment	The Council on Aging provides a wide variety of services to seniors and informs the Town on the housing needs of Brookline seniors. The Council provides case management to seniors experiencing housing problems.	
Center Communities of Brookline	Housing	Services-Elderly Persons	Housing Need Assessment	This agency provides senior housing and was interviewed regarding housing needs of seniors.	

Agency/Group/Organization Type	Type of Organization	Type of Organization (if serving multiple purposes)	What Section of the Plan was addressed by consultation?	How was the organization consulted?	What are the anticipated outcomes of the consultation or areas for improved coordination?
Pine Street Inn	Housing	Services-homeless	Housing Need Assessment	This agency provides housing and services to homeless individuals within the community.	The anticipated outcomes of the consultation are improved coordination and the inclusion of the organization's input in the Consolidated Plan and Action Plan.
Brookline Community Foundation	Foundation	Civic Leaders	Housing Need Assessment	The agency was interviewed to provide information on the Housing Needs Assessment and provide general information on housing needs to the community.	
<b>CONCORD</b>					
Concord Housing Authority	Public Housing Authority	N/A	Public Housing Needs	Consultation	The anticipated outcomes of the consultation are improved coordination and the inclusion of the organization's input in the Action Plan.
Concord Development Housing Authority	Municipal Housing Non-Profit Organization	Other government - Local	Housing Need Assessment	Consultation/Committee Meeting	
<b>FRAMINGHAM</b>					
Framingham Housing Authority	Public Housing Authority	Public Housing Authority	Public Housing Needs	Consultation	The anticipated outcomes of the consultation are improved coordination and the inclusion of the organization's input in the Action Plan.
South Middlesex Opportunity Council	Housing	Services-homeless	Housing Need Assessment	Consultation	
Framingham Planning Office	Other government - Local	N/A	Housing Need Assessment	Consultation	
Framingham Veteran's Office	Other government - Local	Services-homeless	Homelessness Needs - Veterans	Consultation	
Framingham Council on Aging	Services-Elderly Persons	N/A	Housing Need Assessment	Consultation	
Framingham Health Department	Other government - Local	N/A	Omitted	Consultation	
Framingham Assessing Department	Other government - Local	N/A	Housing Need Assessment	Consultation	
Fair Housing Commission	Other government - Local	Other government - Local	Housing Need Assessment	Consultation	
Framingham Disability Commission	Other government - Local	Services-Persons with Disabilities	Housing Need Assessment	Consultation	
Balance of State Continuum of Care	Regional organization	Services-homeless	Homelessness Strategy	Consultation	
Wayside Community Programs	Housing	Services-Children	Housing Need Assessment	Consultation	
Advocates	Services-Persons with Disabilities	N/A	Housing Need Assessment	Consultation	
MetroWest Legal Services	Other	Services-homeless	Homelessness Strategy	Consultation	
MetroWest Center for Independent Living	Services-Persons with Disabilities	N/A	Housing Need Assessment	Consultation	
Bay Path Elder Services	Services-Elderly Persons	Services-Persons with Disabilities	Housing Need Assessment	Consultation	
<b>LEXINGTON</b>					
Lexington Housing Partnership	Housing	N/A	Annual goals	Consultation	The anticipated outcomes of the consultation are improved coordination and the inclusion of the organization's input in the Action Plan.
<b>NATICK</b>					
Council on Aging	Services-Elderly Persons	N/A	Housing Needs	Interview	The anticipated outcomes of the consultation are provision of HOME funds to support a TBRA program in Natick run by the Natick Service Council, along with improved coordination and the inclusion of the organization's input in the Action Plan.
Natick Affordable Housing Trust	Other government - Local	N/A	Housing Needs	Interview	
Natick Housing Authority	Public Housing Authority	N/A	Housing Needs	Interview - Meetings	
Natick Service Council	Human Service Agency	Service- Homeless Services -Children	Housing Needs	Interviews	
Natick 2030+ Planning Process	Housing - gen'l public	N/A	Housing Needs	Public input meetings, resident surveys, collaboration website	
<b>NEEDHAM</b>					
Needham Board of Selectmen	Other government - Local	N/A	Housing Strategy	Held a meeting on October 27, 2015 to discuss the Town's Housing Strategy.	The anticipated outcomes of the consultation are better coordination in the implementation of various elements of the FY16-20 Consolidated Plan's Strategic Plan and the Annual Action Plan.
Needham Housing Authority	Public Housing Authority	N/A	Housing Strategy	Held retreats on January 28 and April 22, 2017 with the Needham Housing Authority to discuss strategic planning related to potential redevelopment activities.	The anticipated outcomes of the consultation are improved coordination regarding priority redevelopment projects and needed resources.
Needham Department of Public Health and Council on Aging	Other government - Local	N/A	Housing Needs	Meeting to discuss report on a Healthy Aging grant to assess barriers to senior-friendly housing.	The anticipated outcomes of the consultation are identification of methods to support a more age-friendly community through housing initiatives.
<b>SUDBURY</b>					
Sudbury Housing Trust	Other government - Local	Service-Fair Housing	Housing Need Assessment	Consultation/Committee Meeting	The anticipated outcomes of the consultation are improved coordination between housing stakeholders in Town and the Trust and inclusion of the organization's input in the Annual Action Plan.
<b>WALTHAM</b>					
Middlesex Human Services Agency	Services-homeless	Services-homeless	Homeless Needs - Chronically homeless	Consultation	Provide grant funds for shelter and reduce homeless population.
Waltham Police Department	Civic Leaders	Services-Chronically Homeless, Homeless Needs - Families with children, veterans, unaccompanied youth	Homelessness Strategy, Non-Homeless Special Needs	Monthly Homeless Coalition meetings, Youth Liaison between PHA and Police Department	Collaborative effort between the Police Homeless Task Force and the City of Waltham Housing Division to develop and implement a HOME TBRA Program for chronically homeless. Monthly meetings attended are by city agencies and officials concerning homelessness in the city.
Salvation Army	Services - homeless	Services - homeless	Homeless strategy	CDBG Emergency Assistance Program Grantee	Address the challenge of continuing assistance to individuals at risk of losing their home and/or utilities with limited funds.
The Greater Waltham Arc	Services-Persons with Disabilities	Service-Persons with disabilities	Non-Homeless Special Needs	Consultation	Provide insight on services needed for adults with developmental disabilities.
The Partnership for Youth	Services-Education	Services-Children	Non-Homeless Special Needs, Anti-Poverty Strategy	Consultation	Share school district data on child poverty rates and needs associated with families in poverty.
REACH	Services-Victims of Domestic Violence	Services-Victims of Domestic Violence	Non-Homeless Special Needs	Consultation	Provide insight into DV options and housing availability.
Boys and Girls Club	Services-Children	Neighborhood Organization	Homelessness Needs- Unaccompanied Youth	Consultation	Extend outreach to older teens and youth.
Waltham Housing Authority	Public Housing Authority	Housing	Public Housing Needs	Consultation	Address need for affordable rental housing for low-income seniors and families and persons with disabilities.
Committee on Downtown Revitalization	Business Leaders	Neighborhood Organization	Market Analysis - Economic Development Needs	Consultation	Encourage economic approach to development.
Community Day Center of Waltham	Services-homeless	N/A	Homeless Needs - Chronically homeless	Consultation	Omitted

Agency/Group/Organization Type	Type of Organization	Type of Organization (if serving multiple purposes)	What Section of the Plan was addressed by consultation?	How was the organization consulted?	What are the anticipated outcomes of the consultation or areas for improved coordination?
Healthy Waltham, Inc.	Services - health	Health Agency	Anti-Poverty Strategy, Homelessness Strategy, Public Housing Needs	Consultation	Healthy Waltham provides the City with information on poverty in schools and how many children are living in hotels and receiving proper nutrition. Healthy Waltham offers cooking lessons and nutrition classes to public housing residents and Waltham hotel families waiting for permanent housing.
The Second Step	Services- homeless	Services- homeless	Housing Needs Assessment; Homeless Strategy; Anti -Poverty Strategy	Consultaion	Improve coordination between agencies to reduce gaps in service areas.
Waltham Committee Inc.	Housing	Services-Persons with Disabilities	Non-Homeless Special Needs - Housing for Persons with Disabilities	Consultation	Provide funding resources through the CDBG rehabilitation program targeted at accessibility improvements to existing housing stock for persons with disabilities.
<b>WATERTOWN</b>					
Watertown Housing Partnership	Other government - Local	N/A	Housing Need Assessment	Housing Partnership reviewed Watertown's section of the FY19 Annual Action Plan	Anticipated outcomes of the consultation are inclusion of the Town Committee's input into the FY19 Annual Action Plan.
Watertown Housing Authority	Public Housing Authority	N/A	Other (Please specify)	Watertown Housing Authority was consulted several times on the FY19 Annual Action Plan	Anticipated outcomes of the consultation are inclusion of the Housing Authority's input into the FY19 Annual Action Plan
Religious Organizations, Social Service Providers and Community Groups	Social Service Providers	Various Services	Other (Please specify)	Mailed a notice of the Watertown Housing Partnership's January meeting to discuss the FY19 Annual Action Plan	No comments received
<b>WAYLAND</b>					
Wayland Housing Authority	Public Housing Authority	Service-Fair Housing	Housing Need Assessment	Consultation	Anticipated outcomes of the consultation are inclusion of the Housing Authority's input into the FY19 Annual Action Plan
Wayland Housing Partnership	Other government - Local	N/A	Housing Need Assessment	Consultation	
Wayland Housing Trust	Other government - Local	Housing	Public Housing Needs	Consultation	
Wayland Real Asset Planning Committee	Other government - Local	Housing/Real Estate	Housing Needs Assessment	Consultation	

<b>AP-10: Other Plans Considered by the City of Newton and WestMetro HOME Consortium</b>		
<b>Name of Plan</b>	<b>Lead Organization</b>	<b>How do the goals of your Strategic Plan overlap with the goals of each plan?</b>
Ten Year Plan to End Homelessness (updated 2014)	City of Newton on behalf of the Brookline Newton-Waltham-Watertown Continuum of Care	The Strategic Plan adopts many of the priorities and strategies detailed in the FY19 Annual Action Plan.
Analysis of Impediments to Fair Housing (updated July 2014)	City of Newton	This Strategic Plan works to address some of the impediments to fair housing identified in the AI.
MetroWest Regional Fair Housing Plan FFY15-FFY20 (updated July 2015)	City of Newton/MAPC/MetroWest	This regional plan, prepared in conjunction with MAPC, builds on previous planning efforts to affirmatively further fair housing, facilitate access to housing choice and opportunity, and address barriers to fair housing identified in the previous AI.
MAPC Metro Boston 2030 Population and Housing Demand Projections and more recent Housing Data Portal	Metropolitan Area Planning Council	Division staff utilized municipal and regional data and projections provided by the MAPC in this document. Division staff adopted the Stronger Region scenario, recommended by the MAPC to plan for the needs that will be facing Newton and the region.
FY18 Annual Action Plan	City of Newton	Key document to inform the City's community development and housing goals throughout FY18 (FFY17).
FY16-20 Consolidated Plan	City of Newton	Key document to inform the City's community development and housing goals through 2020 and basis for the goals included in the FY19 AAP.
2007 Comprehensive Plan	City of Newton	The Comprehensive Plan focuses on strengthening and enhancing Newton as a liveable community, a goal that overlaps with Division staff's efforts to do the same for LMI people in Newton.
Newton Leads 2040 Housing Strategy	City of Newton	The Strategy identified policies and actions with the goal of producing 800 Subsidized Housing Inventory units, including affordable housing, in the City by 2021.

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
HUD Conciliation Agreement (May 12, 2015)	City of Newton	An agreement between the City of Newton and Supporters of Engine 6, Disability Law Center, Inc., and the Fair Housing Center of Greater Boston, which was approved by HUD, and includes actions required of the City to create 9-12 units of permanent supportive housing suitable for homeless persons with disabilities in Newton by May 12, 2020.
Belmont's Draft Housing Production Plan	Town of Belmont	The Strategic Plan chapter for the FY16-20 Consolidated Plan, in addition to the FY19 Annual Action Plan, adopts many of the priorities and strategies detailed in these plans.
Natick 360	Town of Natick	
Natick 2030 Comprehensive Master Plan	Town of Natick	
Natick Housing Production Plan 2016	Natick Affordable Housing Trust	
Natick/Framingham Exit-13 Golden Triangle Study	Town of Natick - City of Framingham	
Previous local housing plans	Needham Planning and Community Development Department	
Local Housing Guidelines	Needham Planning and Community Development Department	
Assessment of Housing and Transit Options for Needham Seniors	Needham Department of Public Health and Council on Aging	
Other HOME reports	Needham Planning and Community Development Department	
Open Space and Recreation Plan	City of Waltham	
Emergency Case Plan	DHCD	
Public Housing Authority Plan (2016)	Waltham Housing Authority	
Watertown Comprehensive Plan (Adopted April 2015)	Watertown Department of Community Development and Planning	
Watertown Housing Production Plan (Adopted January 2014)	Metropolitan Area Planning Council and Watertown Department of Community Development and Planning	
Annual Action Plans	Watertown Department of Community Development and Planning	
"Understanding Brookline: A Report on Poverty"	Brookline Community Foundation	
Framingham Housing Plan	Community Economic Development Department	

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Elder Services 2014-2017 Area Plan	Framingham Bay Path Elder Services	The Strategic Plan chapter for the FY16-20 Consolidated Plan, in addition to the FY19 Annual Action Plan, adopts many of the priorities and strategies detailed in these plans.
Framingham Open Space Plan	Framingham Community and Economic Development Department	
Downtown Framingham Transit Oriented Development Action Plan	Framingham Community and Economic Development Department	The Strategic Plan chapter for the FY16-20 Consolidated Plan, in addition to the FY19 Annual Action Plan, adopts many of the priorities and strategies detailed in these plans.
South East Framingham Study Area	Framingham Planning Board Department	
Town of Wayland Master Plan 2004 (updated 2011)	Wayland Planning Board; Board of Selectmen; Wayland Economic Development Committee	
Town of Wayland Housing Plan 2010 (updated 2015)	Wayland Planning Board; Board of Selectmen; Wayland Economic Development Committee	
Wayland Real Asset Planning Committee Final Report June 2017	Wayland Real Asset Planning Committee; Wayland Planning Board; Board of Selectmen	

## **APPENDIX: AP-12 – CITIZEN PARTICIPATION**

## **AP-12 Participation - 91.401, 91.105, 91.200(c)**

### **1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting**

#### *Consortium Communities*

The Towns of Bedford, Concord, Lexington, and Sudbury use public hearings at the Board of Selectmen meetings when broad public input is needed and/or public hearings are required. The local Boards (Bedford Municipal Affordable Housing Trust, Bedford Housing Partnership, Lexington Housing Partnership, and Sudbury Housing Trust) hold monthly meetings to review and deliberate on all proposed or ongoing affordable housing projects.

In Brookline, the Housing Division staffs the Brookline Housing Advisory Board (HAB), which holds monthly meetings to review all affordable housing projects being undertaken or considered by the Town. All final funding commitments for affordable housing projects are approved by the Board of Selectmen, which act on recommendations from the HAB and hold public hearings for public input. Content related to the FY19 (FFY18) Plan was discussed at the Housing Advisory Board meeting on February 27, 2018. All HAB meetings are open to the public and advertised via the Town's website and blog, to all interested parties, including all Town Meeting members.

On January 1, 2018, Framingham transitioned from a town to a city. The transition eliminated the Town Meeting form of government but not the public participation process required of HUD grant recipients. As a result, the Community Development Department maintained its public participation process, issuing invitations to stakeholders using outreach outlets that included social media, newspapers, newsletters, email and other forums. Community outreach included the CAPER public hearing on September 14, 2017; a needs assessment hearing on November 30, 2017; a meeting by the Community Development Committee to evaluate proposals received for CDBG funds; and a February 1, 2018 meeting to allocate funds. Citizen input, solicited through an electronic survey last year, continued to inform the process. Paper copies of the survey were distributed to libraries, town departments, public housing sites, area nonprofits and other related sites.

In May of 2016, the Town of Natick embarked on Natick 2030+, a two-year process to prepare a comprehensive master plan for Natick that recommends actions to achieve the town's desired vision for its physical environment over the next 20 years. Housing is a major component of this plan. In multiple public engagement events held to date, residents particularly support diversification of the Town's housing stock, development of mid-rise multi-family dwellings (under six stories), development of more barrier-free dwellings and a wider variety of housing types in town that can accommodate a broad array of inhabitants in various life stages.



The City of Waltham Planning Department held a public meeting on January 16, 2018, to gather input on the FY19 (FFY18) Annual Action Plan. Topics discussed included housing and community development needs and proposed use of funds for the upcoming year. Two other public meetings will be held after applications for funding are accepted.

In Watertown, the Watertown Housing Partnership serves as the Town's policy body, whose volunteer members are appointed by the town manager to oversee the development and preservation of affordable housing in Watertown. The Partnership uses email to announce its meetings, as well as agenda postings. The Partnership approved the Watertown components of the FY19 (FFY18) Annual Action Plan on February 20, 2018.

**AP-12: Citizen Participation Outreach for the City of Newton and the WestMetro HOME Consortium**

Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted	Other from Mode
<b>NEWTON</b>					
Public Meeting	General	7 attendees	Committee discussed FY19 AAP process and potential fair housing goals. FHC proposed focusing on one educational event per year. Events will target an audience and highlight specific aspects of fair housing instead of a broad overview.	N/A	Fair Housing Committee
Public Meeting	General	10 attendees	The BNWW CoC discussed funding priorities for the next fiscal year (February 18, 2018); in a special meeting the three non-recipients voted on funding priorities.	N/A	Homelessness; Brookline-Newton-Waltham-Watertown Continuum of Care
Committee Meeting	General	4 attendees	Representatives from the Housing and Community Development Division, Health and Human Services and the Planning and Development Board met relative to the FY19 Human Service program awards (March 2018). Discussion focused on FY19 application evaluations, funding priorities and allocation recommendations.	N/A	Human Services RFP Review Committee
Committee Meeting	General	5 attendees	Representatives from the Housing and Community Development Division, Health and Human Services and the BNWW CoC met relative to the FY19 ESG awards (March 2018). Discussion focused on FY19 application evaluations, funding priorities and allocation recommendations.	N/A	ESG RFP Review Committee
Public Meeting	General	10 attendees at each meeting	The COD discussed the FY19 AAP process and identification of FY19 access projects during their February 12 and March 12 meetings.	N/A	Commission on Disability
Public Hearing	General	20 attendees	Presentation of draft FY19 Annual Action Plan and summary of activities to be undertaken during FY19/FFY18 on May 7, 2018. Many human service subrecipients were in attendance; discussion centered on the importance of CDBG in implementing their respective programs, their gratitude for the City's continued support and how their agencies impact the lives of low-to-moderate income residents.	N/A	P&D Review
Public Hearing	General	25 attendees (first ZAP Mtg)/ 10 attendees (second ZAP Mtg)	Presentation of draft FY19 Annual Action Plan and summary of activities to be undertaken during FY19/FFY18 on May 14, 2018 and May 29, 2018. Discussion focused on proposed housing development goals.		Zoning and Planning Committee
<b>BEDFORD</b>					
Public Hearing	Non-targeted/broad community	Bedford Housing Partnership members attended	Review of the FY19 Annual Action Plan.	N/A	N/A
<b>BELMONT</b>					
Public Meeting	Non-targeted/broad community	12 people attended the meeting including representatives from the Planning Board	Discussion of the need for more small-scale housing; affordable housing; mixed-use in appropriate locations; how to reduce associated barriers.	N/A	N/A
Public Meeting	Non-targeted/broad community	Meeting with the Belmont Housing Authority	Discussion of various goals, objectives and strategies.	N/A	N/A
Other	Other	A series of working meetings with the Board of Selectmen, Planning Board and Belmont Housing Trust.	Review of the draft Housing Production Plan and discussion of goals, objectives and strategies.	N/A	N/A
<b>BROOKLINE</b>					
Public Meeting	Non-targeted/broad community	Meeting of the Housing Advisory Board	Regularly scheduled meeting included discussion of supporting a new affordable rental project being proposed by the Jewish Community Housing for the Elderly.	N/A	N/A
Public Meeting	Non-targeted/broad community	Board of Selectmen	Periodic updates to Select Board regarding project status - televised.	N/A	N/A

Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted	Other from Mode
<b>CONCORD</b>					
Meeting	Non-targeted/broad community	Concord Housing Development Corporation	Review of the FY19 Annual Action Plan.	N/A	N/A
<b>FRAMINGHAM</b>					
Public Meeting	Non-targeted/broad community	Meeting held on September 14, 2017. Four community development committee members in attendance.	Attendees provided their input on the CAPER.	N/A	N/A
Needs Assessment	Nonprofit agency providers/residents	Meeting held on November 30, 2017 with 25 attendees representing various agencies. All community development committee members in attendance.	Local organizations presented on how their services respond to needs, such as youth-oriented programming and economic development initiatives that support downtown businesses.	N/A	N/A
Committee Meeting	Committee members/broad community	Meeting held on January 9, 2018 by committee members to vote in officers and set the scoring of proposals to RFP.	Members set the ground rules for scoring proposals and elected officers.	N/A	N/A
Public Hearing	Non-targeted/broad community	Hearing held on February 1, 2018 to assess proposals submitted for the FY19 public services funding cycle.	The community development committee met to evaluate applications and make decisions about grantees. Committee members asked questions about applications to grantees.	N/A	N/A
Internet Outreach	Non-targeted/broad community	Encouraged residents and individuals of community based organizations to attend public hearings and to remain engaged in town initiatives by signing up to receive alerts through the "Notify Me" function of the Framingham website.	Residents accepted directions to Town's website and sign up for alerts.	N/A	N/A
<b>LEXINGTON</b>					
Other	Non-targeted/broad community; Lexington Housing Authority	Discussion	Project ideas pending.	N/A	N/A
<b>NATICK</b>					
NATICK 2030+ Comprehensive Master Plan	Community-wide	Introductory meeting: 75+ people; first Input meeting: 180 people; future input meetings: 50+ people; Natick 2030+ Metroquest Survey: 1,452 unique responses; Natick 2030+ Goals/Priorities Surveys: 300-900 responses.	A 2+ year process to prepare a comprehensive master plan for Natick that recommends actions to achieve the town's desired vision for its physical environment over the next 20 years. Housing is a major component of this plan. Residents particularly support more barrier-free dwellings and a wider variety of housing types in town that can accommodate a broad array of inhabitants in various life stages.	N/A	N/A
<b>NEEDHAM</b>					
Public meeting	Non-targeted/broad community	The Planning Board held a public meeting on September 1, 2015 to discuss the Town's Housing Strategy.	Comments involved the support of the redevelopment of the NHA's Linden-Chambers project, a Municipal Affordable Housing Trust, new zoning to further encourage multi-family housing and mixed-uses, among other actions.	N/A	N/A
Public meeting	Non-targeted/broad community	The Planning Board and Board of Selectmen held a joint public meeting to discuss the Town's Housing Strategy on October 27, 2015.	Comments included the redevelopment of the NHA's Linden-Chambers project, encouraging new housing in the Town Center and Needham Crossing, greater emphasis on green building, 40R districts, starter housing, etc.	N/A	N/A
<b>SUDBURY</b>					
Public Meeting	Non-targeted/broad community	Open Meeting of Sudbury Housing Trust. Trustees in attendance only.	None received.	N/A	N/A
<b>WALTHAM</b>					
Internet Outreach	Non-targeted/broad community	Community Needs Survey, 2017-2018.	Comments discussed need for public housing upgrades, homeless services.	N/A	Paper surveys also accepted
Public Meeting	Non-targeted/broad community	Meeting held on February 13, 2017; attended by community members and funded agencies.	Need for elderly programming, also a need for ADA upgrades to multiple facilities.	N/A	N/A

Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted	Other from Mode
<b>WATERTOWN</b>					
Public Meeting	Non-targeted/broad community	N/A	Meeting of the Watertown Housing Partnership.	N/A	N/A
Public Meeting	Non-targeted/broad community	N/A	Planning Board Hearing on changes to Inclusionary Zoning.	N/A	N/A
<b>WAYLAND</b>					
Public Meeting	Non-targeted/broad community	Attended by approximately 25 people from the following Boards: Wayland Housing Authority; Wayland Housing Partnership; Wayland Housing Trust; Wayland Planning Board	At this joint meeting it was agreed that the Town would form three working groups to explore how to move the affordable housing agenda forward. Group 1: Defining a shared vision and priorities for affordable housing. Group 2: Monitoring and preserving existing affordable housing. Group 3: Assessing whether there is need for new zoning or overlay districts as outlined in the master plan or other alternatives.	N/A	N/A

## **APPENDIX: AP-20 – ANNUAL GOALS**

## Annual Goals and Objectives

### AP-20 Annual Goals and Objectives - 91.420, 91.220(c)(3)&(e)

#### 1. Goals Summary Information

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 FY19 (FFY18) Annual Action Plan identifies eight goals for the City of Newton.

##### *Goal 1: Production of affordable housing*

In FY19 (FFY18), CDBG and HOME funding allocated to the City of Newton will continue to be used for a variety of programs and activities to preserve and expand affordable opportunities across the City. In alignment with the FY16-FY20 Consolidated Plan, the Division will seek to fund affordable housing projects within mixed-income developments near transit and village centers. They will also seek to identify projects that expand the stock of accessible and visitable housing. Through prior year CDBG and HOME funding, it is also anticipated that 9 units of affordable rental housing will be completed. The 83-85 West Street project, owned by the Housing Authority, includes the acquisition and rehabilitation of an existing duplex to create two units affordable to households earning 80% of the Area Median Income. The Division will also complete the close out of seven additional units created through acquisition, rehabilitation, and new construction at Myrtle Village. Two of these units will be HOME-assisted units. Inclusionary zoning and Chapter 40B Comprehensive Permit projects will create an additional 73 affordable rental units and two affordable homeownership units, leveraged with non-federal resources. Please see the appendix for additional information on these units.

Staff will continue to administer a Downpayment/Closing Cost Assistance program to support and expand sustainable homeownership among low- and moderate-income households in Newton. The program will target homeownership opportunities in new and existing deed restricted homeownership units. It is anticipated that three income eligible homebuyers will be assisted through the CDBG Downpayment/ Closing Cost Assistance program in FY19. The City intends to support up to two income-eligible homebuyers who will be purchasing the affordable units at 1521 Beacon Street (a 40B Comprehensive Permit project) and at least one income-eligible homebuyer who will be purchasing a home through the City's First-Time Homebuyer Resale Program.

*Goal 2: Rehabilitation of housing*

Staff will continue to market and administer the Housing Rehabilitation program (Rehabilitation program) on a rolling basis, which provides homeowners and qualifying nonprofit organizations with deferred payment loans for repairs and improvements aimed at addressing issues related to health, safety, and building code violations. In FY19 (FFY18), the Rehabilitation program will also be expanded to include existing accessory apartments and lodging houses that require repairs to ensure resident health, safety, and building code compliance. Expansion of the program was a direct result of the recent adoption of the City's Accessory Apartment Ordinance and the Lodging House Ordinance. Through FY19 and prior year funding, it is anticipated that approximately five units of homeowner housing will be rehabilitated through CDBG assistance.

*Goal 3: Provision of supportive services to the homeless and at-risk of homeless*

With respect to the Emergency Solutions Grant (ESG), \$156,262 was allocated through a competitive RFP process for local agencies to provide emergency shelter, supportive services, rapid rehousing, and homelessness prevention assistance to homeless and at-risk individuals and families. The City of Newton, Balance of State (BoS) CoC and the former BNWW providers balance consideration of the population's greatest needs in the immediate region and HUD's increased emphasis on funding rapid re-housing and homelessness prevention. During FY19 (FFY18), ESG funding will support 8 programs across 5 sub-grantees.

*Goal 4: Assistance to transition homeless individuals and families to permanent housing*

The Tenant-Based Rental Assistance (TBRA) program has traditionally assisted families at or below 60% of the AMI, with rental vouchers directed toward families experiencing homelessness whenever possible. In FY19 (FFY18), the City will continue to fund TBRA assistance for one household that was selected in FY16 (FFY15) and one household that was selected in FY17 (FFY16), for successful placement in rental homes. FY19 (FFY18) will be the third and final year of assistance for the TBRA households selected in FY16 (FFY15). The City will not issue a new voucher for FY19 (FFY18) as staff considers the extensive administrative undertaking of TBRA, limited available capacity and overall priorities. The Division may reevaluate this goal in the future.

*Goal 5: Creation of permanent and supportive housing for the homeless*

In FY17 (FFY16), the City of Newton released its city-wide housing strategy, *Newton Leads 2040 Housing Strategy* (Strategy), which established the goal of creating an additional 800 Subsidized Housing Inventory units in the City by 2021 through a number of targeted policies and action steps. The Strategy identified six sites that could potentially accommodate nine to twelve units of permanent supportive housing for chronically homeless individuals. In FY18, the City issued a

Request for Proposals for the development of non-age restricted permanent supportive housing for chronically homeless adults with disabilities at 160 R Stanton Avenue. Jewish Community Housing for the Elderly (JCHE) was selected as the developer and will continue to advance development efforts on this project in FY19. JCHE is advancing efforts to engage the neighborhood and determine financing options, which may include a combination of Low Income Housing Tax Credits (LIHTC), DHCD Affordable Housing Trust, Innovation and Stabilization Funds.

*Goal 6: Increase awareness of fair housing policies and practices*

Consistent with the 2015-2020 WestMetro HOME Consortium Regional Fair Housing Plan, the City, in conjunction with the Fair Housing Committee, will continue to collaborate to increase knowledge about fair housing laws and obligations, identify and address discriminatory actions, increase the capacity of the City and Consortium to affirmatively further fair housing and advance access to housing opportunity. City staff will continue to be trained on the fair housing obligations and will in turn develop and sponsor programs to educate elected officials, decision makers, and the general public about these obligations. The City, WestMetro HOME Consortium and FHC will also initiate development of the 2021-2025 Regional Analysis of Impediments, which in addition to the above measures, will involve conducting an updated Analysis of Impediments to Fair Housing Choice and outline meaningful goals and objectives to undertake in overcoming identified barriers.

*Goal 7: Provision of human services*

Human service grants will support 15 public service agencies and organizations during FY19 (FFY18). A total of \$321,230 was distributed through a competitive process held in conjunction with the ESG RFP. Selected programs cover a wide range of services that will address the needs of vulnerable populations parallel to the Brookings Institution's "Benchmarks for Success" model recently adopted and adapted by the City. These programs will directly benefit low-to-moderate income youth, families, persons with disabilities, and seniors, and assist in moving families out of poverty. An estimated 2,014 people will be served through the human service program over the next program year.

*Goal 8: Implementation of architectural accessibility improvements for persons with disabilities*

Five and a half percent of CDBG funds, \$105,000 will be allocated to the installation of an ADA accessible bathroom on the first floor of City Hall.

*HOME Consortium Goals*

The Consortium communities identified the creation of affordable housing, both ownership and rental, rehabilitation and tenant-based rental assistance, as goals for the FY19 (FFY18) program year.



Bedford will continue its Tenant Based Rental Assistance Program and plans to support four additional households in the upcoming year.

In FY19 Brookline's Trustman Apartment project will be complete, yielding 11 HOME-assisted units. The town committed HOME funds to the rehabilitation of the Trustman Apartments, a state funded housing authority development, in FY17 (FFY16). HOME funds will be committed in FY19 to assist with the development of new rental housing opportunities for extremely low-, low-, and moderate-income households. This project is being developed by the Jewish Community Housing for the Elderly and is expected to create 11 HOME units in FY20 (FFY19).

Concord plans to start a feasibility analysis for an affordable assisted living facility. The facility will include 83-units of new construction overall, 5 HOME assisted units. All units will be restricted. The development, Junction Village, has received its Comprehensive Permit and has applied to DHCD for funding. This is a new project.

The City of Framingham will assist 40 households through the Tenant-Based Rental Assistance program. This security deposit and first month's rent subsidizing program has provided needed relief to renters and the City is committed to continuing this effort in FY19 (FFY18). The City of Framingham sets a general target for housing development projects that it works to reach as partnerships are formed with local housing developers throughout the fiscal year.

The Town of Natick will provide ten households with assistance through the Town's Tenant-Based Rental Assistance (TBRA) program. This program uses HOME funds to cover one-time rental costs, such as security deposits, for eligible families and individuals.

Belmont, Needham and Lexington have no ongoing HOME projects. Sudbury is continuing to utilize HOME funds to repay Natick for funds borrowed to finance the Coolidge at Sudbury project.

Waltham will utilize HOME funds to provide security deposits to chronically homeless individuals and families as well as at-risk elderly households through the City's Tenant-Based Rental Assistance program. Waltham expects to assist 25 households in FY19 (FFY18) through this program.

Watertown does not have any pending HOME supported projects that will be completed in FY19 (FFY18) and will rely on its Inclusionary Zoning to create additional affordable units. The Town does not expect to utilize HOME funds for a Watertown based project in FY19 (FFY18).

In FY17 (FFY16), the Town of Wayland, through its Affordable Housing Trust, began accessing Special Permit Mitigation funds from the New Town Center Development to support the purchase of a single family home with five bedrooms at 11 Hammond Road in Cochituate Village.

The Trust is working with the various housing boards to create two additional housing units at this same location.

**AP-20: Annual Goals for City of Newton & WestMetro HOME Consortium for FY19**

Name of Goal	Funding	Description of Goal	Category of Goal	Geographic Area (if applicable)	Start Fiscal Year	End Fiscal Year	Outcome	Objective	Goal Outcome Indicator (GOI)	Quantity	Unit of Measurement	Priority Needs Addressed (as identified in section SP-25 of the FY16-20 Con Plan)
<b>NEWTON</b>												
Production of New Affordable Units	CDBG: \$841,841.00 HOME: \$186,498.46	Increase production of new affordable units and visitable and accessible units through incentives, flexible funding, and	Affordable housing	N/A - Citywide	2019	2019	Affordability	Provide decent affordable housing	Rental units constructed	9	Household housing unit	Affordable housing near amenities, additional accessible rental units and visitable housing, inclusionary zoning
									Homeowner housing added	0	Household housing unit	
Housing Rehab	CDBG: \$381,250.00	Continue the housing rehab program for income-eligible residents, including improvements for accessibility and	Affordable housing	N/A - Citywide	2019	2019	Availability/acc essibility	Provide decent affordable housing	Homeowner housing rehabilitated	5	Household housing unit	Housing rehab; aging in place; public housing rehabilitation
									Rental units rehabilitated	0	Household housing unit	
Supportive Services (ESG + CDBG)	HESG: \$156,262	Provide supportive services for individuals and families that are homeless or at-risk for homelessness	Homeless	N/A - Citywide	2019	2019	Availability/acc essibility	Create suitable living environments	Other-Assistance to homeless and at-risk for homelessness	820	Persons assisted	Supportive services
Improve Transition to Permanent Housing	\$0	Continue support of transition as families and individuals move from homelessness into permanent housing through the pilot TBRA program. Will not issue new voucher during FY19.	Homeless	N/A - Citywide	2019	2019	Affordability	Provide decent affordable housing	Tenant-based rental assistance / rapid rehousing	1	Households Assisted	Transitional and permanent housing units; improve transition to permanent housing
Permanent and Supportive Housing	\$0	Increase the number of permanent supportive housing units for chronically homeless persons with disabilities and individuals/families experiencing homelessness	Homeless	N/A - Citywide	2019	2019	Availability/acc essibility	Provide decent affordable housing	Housing for homeless added	0	Household housing unit	Transitional and permanent housing units; improve transition to permanent housing
Fair Housing	\$0	Meet the need for more fair housing education, enforcement, and obligations.	Other - housing fairness	N/A - Citywide	2019	2019	Availability/acc essibility	Provide decent affordable housing	Other-Educational events	1	Other-Educational events held	
									Other-Publicity and outreach	1	Other-Publicity items	
Human Services	CDBG: \$321,230.00	Provide financial support for organizations and agencies serving individuals that fall under key areas of need, including children, teens, families, persons with disabilities, and seniors.	Non-homeless special needs	N/A - Citywide	2019	2019	Availability/acc essibility	Create suitable living environments	Public service activities other than Low/Moderate Income Housing benefit	2,014	Persons assisted	Human services
Architectural Access	CDBG: \$105,000.00	Increase access, throughout the City, to public thoroughfares, public buildings, parks and recreational facilities, and nonprofit agencies.	Non-housing community development	N/A - Citywide	2019	2019	Availability/acc essibility	Create suitable living environments	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing (LMH) Benefit	6,050	Persons Assisted	Architectural Access
<b>BEDFORD</b>												
Rental housing	HOME: \$28,855.00	Funds will be used to assist the creation of rental housing, rehabilitation of rental housing, or tenants through a TBRA.	Affordable housing	Bedford	2019	2019	Affordability	Provide decent affordable housing	Tenant-based rental assistance	4	Households Assisted	Tenant-based rental assistance
<b>BELMONT</b>												
No FY19 goals.												
<b>BROOKLINE</b>												
New Rental Housing	HOME: \$718,686.85	Funds will be used to develop new rental housing opportunities for extremely low-, low-, and moderate-income households - JCHE Affordable Senior Housing	Affordable housing	Brookline	2019	2020	Affordability	Provide decent affordable housing	Rental units constructed	11	Household housing unit	Rental Housing
Preservation of Rental Housing	HOME: \$0	Funds will be used to preserve affordable rental housing for extremely low-, low-, and moderate-income households.	Affordable housing	Brookline	2019	2019	Affordability	Provide decent affordable housing	Rental units rehabilitated	11	Household housing unit	Rental Housing
<b>CONCORD</b>												
Rental Housing	HOME: \$34,944.00	Funds will be used to assist the creation of rental housing for senior and disabled individuals	Public Housing	Concord	2016	2020	Affordability	Provide decent affordable housing	Rental units constructed	5	Household housing unit	Rental Housing
No FY19 goals.												
<b>FRAMINGHAM</b>												
Housing Development	HOME: \$131,094.19	Promote the development of new affordable units.	Affordable housing; public housing	Framingham	2019	2019	Affordability	Provide decent affordable housing	Rental units constructed	20	Household housing unit	Housing development
Rental housing	HOME: \$333,063.03	Funds will be used to assist in the rehabilitation of rental housing, or assist tenants through a TBRA.	Affordable housing	Framingham	2019	2019	Affordability	Provide decent affordable housing	Tenant-based rental assistance / rental units rehab	40	Households Assisted	Tenant-based rental assistance

Name of Goal	Funding	Description of Goal	Category of Goal	Geographic Area (if applicable)	Start Fiscal Year	End Fiscal Year	Outcome	Objective	Goal Outcome Indicator (GOI)	Quantity	Unit of Measurement	Priority Needs Addressed (as identified in section SP-25 of the FY16-20 Con Plan)
<b>LEXINGTON</b>												
No FY19 goals.												
<b>NATICK</b>												
Rental Assistance	HOME: \$124,441.00	Funds will be used to assist in the rehabilitation of rental housing, and assist tenants through a TBRA.	Affordable housing	Natick	2019	2019	Affordability	Provide decent affordable housing	Tenant-based rental assistance / rental units rehab	10	Households Assisted	Rental Housing
<b>NEEDHAM</b>												
No FY19 goals.												
<b>SUDBURY</b>												
No FY19 goals. All funds in this year will be used to repay Natick for funds borrowed to finance the Coolidge at Sudbury project.												
<b>WALTHAM</b>												
Affordable Housing/Rental Assistance	HOME: \$494,904.98	Funds will be used to assist tenants through a TBRA program. A Security Deposit program and full rental assistance will be provided to chronically homeless individuals and at-risk elders.	Affordable Housing	Waltham	2019	2019	Affordability	Provide decent affordable housing	Tenant-based rental assistance / rental units rehab	25	Households Assisted	Rental Housing
<b>WATERTOWN</b>												
No FY19 goals.												
<b>WAYLAND</b>												
No FY19 goals.												

## **APPENDIX: AP-55 – AFFORDABLE HOUSING**

## Affordable Housing

### AP-55 Affordable Housing - 91.420, 91.220(g)

#### *Consortium Communities*

The Town of Bedford plans to assist at least four households with HOME financial rental assistance in FY19. Bedford has other active affordable housing projects. The Town is assisting POAH (Preservation of Affordable Housing) with the preservation of 96 units of housing at Bedford Village with \$3,000,000 of Bedford CAP funds. This development was originally funded through the State's 13A program, and the affordability restriction is expiring in March of 2018. The project includes the change of ownership of 447 Concord Road in Bedford, a HOME-assisted development. The Town is also supporting the Coast Guard property, with the Pine Hills Crossing development, with overlay zoning for the March 2018 Town Meeting. Bedford has commissioned a Housing Strategic Study to review current data and discuss future goals and strategies. The Town currently has 977 affordable units, with 18.36% of its housing included in the Commonwealth's Subsidized Housing Inventory (SHI).

Though not HOME funded, the Town of Belmont anticipates 112 rental units with 10% affordable will begin to come online during FY19 (FFY18) at The Bradford, formerly Cushing Village.

In Brookline, a new project with a total of 62 new units of affordable rental senior housing will continue during FY19 (FFY18). This project begun in FY17 (FFY16) and it is expected that project closeout will occur in FY20 (FFY19), when it is fully occupied. The Town continues to process a number of 40B projects which will add additional affordable units to the Brookline's housing stock. In addition, the Town is working with owners of a large parcel in Coolidge Corner on a mixed-use redevelopment that will contain a large number of residential units, including affordable units. It is anticipated that if approved, these projects will add hundreds of new units of housing over the next several years, with 15% to 25% of these projects being affordable to households earning less than 80% of Area Median Income. Finally, Brookline's Public Housing Authority will embark on a multi-year strategic preservation initiative that will rehabilitate and preserve its six federal housing developments through the HUD Rental Assistance Demonstration program, with state and local support.

The Town of Concord has a history of supporting efforts to establish and maintain affordable housing. The Town currently has 710 affordable units, with 10.3

6% of its housing included in the Commonwealth's Subsidized Housing Inventory (SHI). The Peter Bulkeley project was completed in FY18 (FFY17) and created four new units of senior housing.

Concord expects to start feasibility planning for an affordable assisted living facility project that will include 83 units of new construction overall, and 5 HOME-assisted units. All units will be restricted. The development, Junction Village, has received its Comprehensive Permit and has applied to DHCD for funding. This is a new project.

In recent years, Framingham's Community Development Department committed to operating Tenant-Based Rental Assistance, as well as creating new affordable housing through local partnerships. Such efforts have culminated in the preservation of affordable housing in partnership with SMOC, which restricted 58 units on the subsidized housing inventory. The City will continue to promote development of new affordable units and rehabilitation of rental housing.

The Town of Lexington completed funding for the Keeler Farm project in FY18. Discussions with the Lexington Housing Authority have begun regarding future potential projects.

The Natick Affordable Housing Trust is using several previous years' HOME allocations to support renovation of the Coolidge House Congregate building which will be converted from 18 Single Room Occupancy units to 10 one-bedroom units, and will eventually be leased to the Massachusetts Department of Mental Health in FY18. In FY19, the Trust will fund a new Tenant Based Rental Assistance service offered by the Natick Service Council through their financial assistance program.

The Town of Needham approved three affordable rental developments that were permitted through the Chapter 40B comprehensive permit process, most through the State's Local Initiative Program otherwise known as the "friendly 40B" process. These projects included five affordable units that were mandated by special zoning for new independent living units as part of a Continuing Care Retirement Community developed by Wingate which are now all occupied. Another 390 rental units were approved for the Second Avenue Residences (now called The Kendrick) development which is part of the redevelopment of a business area into mixed office, retail, residential and recreational uses. This project will include 98 affordable units and is currently being marketed for initial occupancy in the summer of 2018. The permitting of another large rental housing project, Modera Needham, will generate a total of 136 units, 34 of which are affordable. These units are also currently being marketed for initial occupancy in the summer of 2018. These projects put the Town at a 12.61% level of housing affordability.

The Town of Needham, through its Department of Public Health and Council on Aging, also received a grant from the Massachusetts Association of Health Boards for Healthy Aging through Healthy Community Design for an assessment of community conditions and barriers to senior-friendly housing and transit in Needham. This assessment recommended a number of measures for the Town to explore to help seniors age in place. The Town is currently pursuing several of

these recommendations including the potential permitting for accessory dwelling units that will lend greater diversity and affordability to Needham's housing stock.

The City of Waltham Inclusionary Zoning Ordinance requires at least 10 percent of units in residential developments with 8 or more dwellings to be affordable to households at 80% of the Area Median Income. Recent developments, triggering this requirement, added a total of 83 affordable rental units to the Waltham subsidized housing inventory (SHI). Nineteen of the SHI units added are affordable elderly units developed by the City of Waltham.

Watertown will continue work to create the assessing, taxation financial infrastructure necessary to implement the Community Preservation Act, and to set up a CPA Committee. Strategy 2.2 of Watertown's 2014 Housing Production Plan recommends the Town "analyze industrial and Pleasant Street Corridor zoning districts to identify areas more appropriate for mixed use and/or multi-family development..." In 2015, the Town changed the zoning in the Pleasant Street Corridor, to incentivize mixed use. In 2017, one mixed use apartment project was approved in the Corridor by Special Permit, and another was under review.

The Town of Wayland will continue to make progress on efforts to sell River's Edge, a town-owned parcel on Route 20. The site represents an extraordinary opportunity in Wayland, with zoning in place to build 188 multi-family residential units in primarily three to four story buildings. The Wayland Planning Board sees this project as a unique opportunity to build attractive, higher density housing for which there is demand. The project also meets Commonwealth goals, including Smart Growth principles by transforming abandoned municipal industrial property into attractive affordable housing. Detailed bid proposals and qualifications were issued on April 21, 2016 and Wood Partners was subsequently selected as the developer. The Wayland Board of Selectmen signed the Land Agreement with Wood Partners on July 31, 2017. The Planning Board looks forward to reviewing the final site plan approval in 2018. The Town also recently received a \$2.4 million MassWorks Grant for water infrastructure improvements for this project.



## **APPENDIX: AP-65 – HOMELESS AND OTHER SPECIAL NEED ACTIVITIES**

## **AP-65 Homeless and Other Special Needs Activities - 91.420, 91.220(i)**

**Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including:**

- 1. 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**
  - a. Shortening the period of time that individuals and families experience homelessness**

ESG funding will continue to target Rapid Rehousing and Homelessness Prevention activities to quickly connect individuals and families with the support they need to exit homelessness and achieve housing stability. Aligning with HUD and City priorities to provide early interventions to prevent homelessness, additional funding has been allocated to Rapid Rehousing and Homelessness Prevention during FY19 (FFY18).

City staff and the BoS will continue to assess the challenges of the existing rental market within the neighboring communities of Brookline, Newton, Waltham and Watertown to determine the feasibility of scaling up this approach through local partnerships.

- b. Preventing individuals and families who were recently homeless from becoming homeless again**
  - Utilize Emergency Solutions Grants for Homeless Prevention and Rapid Rehousing
  - Educate service providers and CoC communities about available funds

In addition to Rapid Re-housing, the Division will also utilize ESG funding for Homeless Prevention to reduce the number of individuals and families who are evicted from housing. These funds provide the financial resources to keep at-risk households housed, as well as the supportive

services to help stabilize the household and ensure successful tenancies.

- Research and disseminate best practices for working with at-risk populations
- Identify and engage job training and employment services providers

A central goal of the City, BoS, and federal partners is to reduce the number of individuals and families becoming homeless through the provision of appropriate supportive services and financial assistance. Engaging, educating, and seeking cooperation with stakeholders, regarding the decrease of risk factors leading to homelessness, will assist in accomplishing this goal. Key partners will be necessary to ascertain and ensure that critical services are available to adequately engage in the prevention of homelessness and to comprehensively support previously homeless individuals and families experiencing community integration issues. Enforcement of ESG policies and procedures will supplement these efforts, through the promotion and access of mainstream services with particularly at-risk households.

**c. facilitating access for homeless individuals and families to affordable housing units**

- Finalize and Review Housing Strategy to identify sites for permanent supportive housing

Following the directive of the United States Interagency Council on Homelessness (USICH) and the BoS's Ten-Year Plan to End Homelessness, the City's Department of Planning and Development is focused 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. An underutilized, 16,900 square foot city parcel, located at 160 R Stanton Avenue, was one of those sites selected specifically for the creation of nine to twelve units of non-age restricted permanent supportive housing for chronically homeless adults with disabilities.

The City of Newton has made significant progress in these efforts. An RFP was released on August 30, 2017, with proposals due October 5, 2017. Jewish Community Housing for the Elderly (JCHE), the sole respondent, was selected as the developer, following the review of their proposal by a five member evaluation committee. JCHE is now advancing development efforts, and has begun taking steps to engage the neighborhood. The first neighborhood meeting held on February 15, 2018 and JCHE is currently working on securing project funding.

Additionally, the BoS will facilitate a BNWW area needs assessment during FY19 (FFY 18) to get feedback from local providers, direct care workers and constituents regarding housing and

homeless needs. The initiative will culminate in a report that can complement ongoing planning efforts.

- Prioritize 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.

#### *Consortium Communities*

The Bedford Youth and Family Services works with Bedford residents who are receiving public assistance and may be at risk of losing housing by providing information about counseling, food stamps, fuel assistance, or TAFDC, and emergency financial assistance. The veterans' agent works closely with the Department of Veterans Affairs and provides state financial and medical (Chapter 115) benefits to an average of 50 veterans, over half of whom have been previously homeless and now reside in VA housing.

The Town of Concord's Community Services Coordinator and the Health, Fire, and Police Departments work on an individual basis to assist homeless persons in finding emergency shelter and transitional housing, while also working together to identify any at-risk households or individuals and assist them in seeking assistance programs as needed. In addition, Concord works with regional resources when there are homelessness issues resulting from a home foreclosure.

The Framingham Community Development Department is also a member of the Massachusetts Housing and Community Development Department's Balance of State, Continuum of Care project review committee. Serving on this committee allows the department to understand the housing and service needs for the homeless and improve its own programs targeting homeless individuals and families.

The Massachusetts Department of Developmental Services provides 38 units of housing in Natick. Most of these units are occupied by persons with mental and/or physical disabilities.

The City of Waltham allocates CDBG funds for homelessness prevention through an emergency assistance program. Individuals and families facing homelessness due to rent or energy billing arrears, or other unforeseen circumstances, are able to apply for financial assistance in order to prevent homelessness. The HOME TBRA program provides rental assistance to homeless with supportive services through local agencies and the Waltham Police Homeless Task Force. The City has contracted with the Charles River Community Health Center to provide intake screenings on

Waltham's most vulnerable residents. Intakes include behavioral screening, initial counseling, support and placement in a facility adequate for the condition of the client.

The Sudbury town social worker manages the HOPE Sudbury applications that provide a range of homeless prevention services, including: grants toward rent to prevent evictions, landlord mediation, budgeting education and information referrals.

## **APPENDIX: AP-75 BARRIERS TO AFFORDABLE HOUSING**

## **AP-75 Barriers to affordable housing - 91.420, 91.220(j)**

- 1. Actions it planned 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**

### **Fair Housing**

Actions anticipated for addressing concerns regarding fair housing include the following:

- The City continues to advance the redesign of its current Zoning Ordinance, the most comprehensive revision to its zoning in decades. Division staff and the Fair Housing Committee (FHC) will actively ensure that proposed zoning changes support the City's goal to affirmatively further fair housing and avoid creating disparate impacts to protected classes.
- As the deadline for submission of Assessment of Fair Housing has been suspended, the City, WestMetro HOME Consortium and FHC will embark on the development of the 2021-2025 Regional Analysis of Impediments. Consistent with the Fair Housing Act and Fair Housing Planning Guide, the City, in combination with the Consortium and FHC, will conduct an updated Analysis of Impediments to Fair Housing Choice (AI) and outline meaningful actions to overcome the effects of identified impediments.
- The FHC will present findings related to a discrimination study completed for Newton by the Fair Housing Center of Greater Boston. The final report will include a quantitative and qualitative analysis and discussion of community trends as they pertain to housing discrimination. The completed study will inform the 2021-2025 AI.
- The City seeks to ensure that consideration of fair housing goes beyond regulatory minimums in order to implement the City's documented fair housing development goals and objectives. The Fair Housing Committee assisted the City in developing the Fair Housing Project Consideration Tool for staff to utilize during project review. The tool goes beyond the reach of regulatory measures as City staff evaluate applicable housing development projects for consistency with fair housing goals and policies as outlined in the FY16-20 Consolidated Plan. All evaluations will result in a statement that "the objectives of the City's Consolidated Plan, including fair housing, have been considered in this review."
- Information designed to guide the public and developers on the process for developing affordable housing and Comprehensive Permit projects in Newton will continue to be

available on the Planning and Development Department website. The webpage details the City's fair housing policy and obligation to affirmatively further fair housing.

- The City's Fair Housing Statement is posted on its website. This Statement is also available in written documents through city departments, venues, sponsored events, activities targeting abutters of pending development, and zoning related actions affecting housing. At community meetings related to pending housing developments, the City will continue to inform the public of the City's responsibility to affirmatively further fair housing, disseminating in writing, the City of Newton's Fair Housing Statement. The City will include the US Department of Housing & Urban Development's (HUD) Fair Housing logo on all pertinent housing documents.
- The City and FHC will revamp its efforts to plan for informative and meaningful fair housing programming, striving for a minimum of one event and one outreach campaign annually. Training will be provided on an annual basis to city councilors, city staff, community partners, the general public and others involved in activity related to the provision of housing. Presentations may include a variety of topics such as disparate impact and fair housing principles. Additional events and outreach will be undertaken if circumstances support these efforts.
- The City's fair housing complaint process is driven by the Newton Human Rights Commission. The Human Rights Commission is authorized under the City of Newton Ordinance to consider claims of discrimination related to housing in Newton that are filed within 300 days of occurrence. The Commission acts as a neutral party which receives and investigates complaints, attempts to resolve them informally and propose remedial actions, if necessary. Complaints can be filed to the Commission in person, through an online discrimination reporting tool, or in written form. The City, Division staff and the FHC will promote this resource, particularly to individuals and families of protected classes, in an effort to report and stem potentially discriminatory actions. Division staff will also encourage nonprofit housing providers to report similar acts of discrimination and enforce responsiveness consistent with City policies to address discriminatory matters.
- Additionally, the City progresses on efforts to create nine to twelve units of non-age restricted permanent supportive housing for chronically homeless adults with disabilities. The priority parcel, 160 R Stanton Street successfully underwent the City's disposition and procurement process. The developer, Jewish Community Housing for the Elderly, is now advancing development efforts, and has begun taking steps to engage the neighborhood.



The first neighborhood meeting was held on February 15, 2018.

### *Consortium Communities*

In June of 2015, the City of Newton and the WestMetro HOME Consortium submitted its Regional Fair Housing Plan for the years FFY2015-2020.

The Town of Bedford also completed its Analysis of Impediments to Fair Housing Choice in 2013, which outlined five key barriers to affordable housing: lack of accessory apartments; monitoring and maintenance; density and cluster developments; parking; and other ongoing efforts. Town staff will continue to examine the Accessory Apartment Bylaws to determine how to increase the number of accessory units. Staff will work with the Regional Housing Services Office (RHSO) to fulfill monitoring requirements, as well as seek out additional affordable housing opportunities to create units within existing zoning guidelines. Finally, staff will review zoning bylaws to gain a better understanding of the impact of parking standards on affordable housing development, promote fair housing and encourage the recruitment of minority applicants to town boards and committees.

In 2016, the Town of Brookline completed a Housing Production Plan which was approved by the State's Department of Housing and Community Development. This Plan outlines strategies that the Town will pursue to increase affordable housing production. It also identifies specific areas of Town that can support additional affordable and mixed-income housing, with a particular focus on underutilized parcels in Brookline's commercial corridors. Brookline will continue to use its Zoning Bylaw proactively to encourage affordable housing as part of a market-rate project through its inclusionary zoning provision. In FY19, the Housing Advisory Board will be undertaking an evaluation of the Town's Inclusionary Zoning bylaw to see if it can be strengthened to increase affordable housing benefits of on-site units and/or cash payment to the Housing Trust. In addition, the Housing Advisory Board continues to explore options to allow Accessory Dwelling Units in conjunction with the Brookline Community Aging Network.

Concord continues to work towards addressing identified impediments as documented in the 2013 Analysis of Impediments, the 2015 Regional Fair Housing Plan, and the 2015 Concord Housing Production Plan. Specific actions aimed at addressing the high cost of existing housing and shortage of available land include working with the Concord Housing Development Corporation to develop Junction Village, an affordable housing proposal on former state land in West Concord; using CPA funding to restore the affordability of units at the Emerson Annex building when they become available and establish new affordable housing restrictions; assisting the CHDC's Small Grants Program to help low- and moderate-income homeowners make necessary safety and other improvements to their existing homes; and utilizing HOME funds to rehabilitate and improve the accessibility of existing affordable housing units and create new units when possible. The Town will also continue to support the work of the Concord Housing

Authority and of the Concord Housing Development Corporation wherever possible. The Town will encourage development which provides new affordable units dispersed widely throughout the community; consider new Smart Growth legislation and other models for developing housing within the community; encourage mixed-use developments which provide some affordable housing at close proximity to transportation and community services; and, provide guidance and assistance to existing affordable housing homeowners and potential developers in identifying energy efficient programs and incentives to defray the cost of new construction and reduce overall housing costs.

The City of Framingham's Community Development Department is committed to operating a Tenant-Based Rental Assistance program as well as creating new affordable housing through partnerships in FY19 (FFY18). In the coming year, Framingham will foster housing development by providing more incentives, such as tax increment financing; enforcing newly implemented zoning changes that encourage developer investment in the downtown; and using obsolete properties for new affordable or mixed-income housing. City-wide, there is an Inclusionary Zoning Bylaw, which requires that 10% of units in new housing developments with 10 or more apartments be reserved for households earning 80% or less of AMI. Seventy-five new units from pipeline projects are expected in the next year and near future.

The Town of Lexington completed its Analysis of Impediments to Fair Housing Choice in 2013, as well as the 2015 Regional Fair Housing Plan. The single largest barrier to fair housing choice in Lexington is its high cost of entry, as a result of the relative scarcity of housing units combined with the high regional demand. Lexington continues to work on zoning ordinances to encourage affordable components and to work in partnership with developers for the creation of affordable units.

Natick faces the barriers of the high cost of construction and high demand for property, which makes it difficult to maintain and develop housing that is affordable to a diverse population. The Town has seen several 40B, 40R and local HOOP projects which encourage developers to provide affordable housing while developing these cost restrictive properties. Natick also promotes zoning bylaws which encourage the further development of affordable housing, including the expanding of 40R and HOOP districts and implementing Inclusionary Zoning. The Town is exploring the creation of "Tiny Houses" to provide low-cost housing, and adopting a Transitional Overlay Option Plan (TOOP) that will help promote development of accessible, barrier-free housing. In January of 2018, the Natick Planning Board started drafting a zoning bylaw amendment for a Comprehensive Inclusionary Requirement for Affordable Housing, which will mandate at least 15% of units in residential developments with six or more dwellings be eligible for inclusion on the Commonwealth's Subsidized Housing Inventory (SHI). Such housing is mandated by statute to be affordable to households earning at most 80% AMI. The Natick Zoning Board of Appeals also started reviewing a new Chapter 40B Comprehensive Permit application in January of 2018 for Cloverleaf West, a proposed 124 unit apartment complex with 25 apartments

affordable to households earning 60% AMI.

Given limited developable property and zoning constraints, the Town of Needham is promoting rental redevelopment projects in primarily commercial areas, where higher densities are more appropriate and where housing can create a “work, live and play” environment. For example, the Town is working with developers of property in Needham Crossing, a major business park, to develop some of their recently acquired property for residential use, including affordable housing. This project has been processed through the State’s Local Initiative Program (LIP), the “friendly Chapter 40B” alternative, to override local zoning. Construction is well underway on the 390 rental units, 98 of which will be affordable based on state LIP requirements. The Town also approved a 136-unit Chapter 40B rental development on Greendale Avenue that will include 34 affordable units. These projects will create a total of 132 affordable rental units which will be ready for occupancy in the spring or summer of 2018. Another five affordable rental units were created as part of special zoning through an Elder Services Overlay District that required 10% of all independent living units be affordable. A new Mixed-Use Overlay District (MUOD) was recently approved by Town Meeting to promote mixed uses, including a mandate for including affordable housing, in an area in proximity to Route 128 and Highland Avenue that is appropriate for higher housing densities and mixed residential and commercial uses.

As mentioned above, another Needham initiative involved a grant from the Massachusetts Association of Health Boards for Healthy Aging to conduct an assessment of community conditions and barriers to senior-friendly housing and transit. The project included special focus groups, interviews, research and data analysis, and a community survey. The most prominent theme in all of the focus groups was the lack of affordable and senior-appropriate housing in the community. Recommendations from the study included ways to adapt existing homes to enable seniors to age in place, to modify zoning to allow accessory apartments, and to create improved housing opportunities for seniors. The Planning Board and Board of Selectmen are currently studying these recommendations.

The largest barrier to affordable housing in Waltham is the constant increase in housing costs. While there are public policies to create affordable housing and incentivize affordable housing, a majority of Waltham residents are unable to afford their current housing situation. Funding constraints hinder the City’s ability to keep up with subsidizing housing in order to keep families in their homes and avoid homelessness. Public comments received through general meetings and forums also indicate the Town’s lack of ability to increase housing stock. Many lots have been built-out throughout Waltham and public comments highlighted the increase in congestion. One of the Community Housing Development Organizations (CHDO) serving the Metro West HOME Consortium has indicated the largest barrier is the competition for an affordable unit on the open real estate market.

The Assessor's Office actively identifies affordable home ownership units in Watertown, and affirmatively chooses to keep the Town's assessment of these units affordable. Watertown Housing Partnership continues to strongly advocate for affordable housing, including a 2017 zoning amendment to allow assisted living facilities in more areas of Town. The Town adopted the Community Preservation Act in the fall of 2016. Some of the funding from this local tax is expected to be used to create additional affordable housing.

It is cost prohibitive to create affordable housing in Wayland. Available land for the development of housing is limited and expensive. With minimum lot sizes and no zoning provision for multi-family units, affordable housing is only permitted through Chapter 40B. The Town of Wayland has taken steps to remove these barriers by utilizing town owned land for affordable housing. Examples include the Nike Development, 11 units of owner occupied affordable housing; River's Edge, 190 units of a potential multi-family housing; and Stonebridge Road, four units of affordable housing. Wayland will continue to develop its pipeline of affordable housing to assist low-income households in the purchase and rental of safe and decent housing.

## **APPENDIX: AP-90 – PROGRAM SPECIFIC REQUIREMENTS (HOME)**

## Program Specific Requirements

### AP-90 Program Specific Requirements - 91.420, 91.220(I)(1,2,4)

#### HOME Investment Partnership Program (HOME) Reference 24 CFR 91.220(I)(2)

1. A description of the guidelines that will be used for resale or recapture of HOME funds when used for homebuyer activities as required in 92.254, is as follows:

For those communities that have utilized HOME funds for homebuyer and homeownership activities, program participants are required to occupy the property acquired with assistance through the program as their principal residence for the duration of the Affordability Period, in accordance with **24 CFR 92.254(a)(4)**. The Affordability Period is determined by the amount of HOME financial assistance provided to the program participant, as detailed in the table below.

Downpayment/Homebuyer	Affordability Period
Less than \$15,000	Five (5) Years
\$15,000 - \$40,000	Ten (10) Years
Over \$40,000	Fifteen (15) Years

Period of Affordability Chart

#### ***Bedford, Belmont, Concord, Lexington, Needham, Sudbury and Wayland***

These communities are unable to utilize HOME funds for ownership units of new construction due to the conflicts between the State's affordable housing deed riders and the HOME Program rule, with respect to the resale and recapture provisions. These communities understand that if a HOME-assisted homeownership project or program is put forward, the recapture/resale provision will have to be submitted to HUD (through the Consortium Administrator) for approval prior to HOME funds being used for such assistance. This guideline has not changed since the submission of the FY16-20 Consolidated Plan.

#### ***Brookline***

When providing homebuyer assistance, that is, funding directly to a homebuyer to purchase an existing unit at a market price, the Town will continue to pursue two different strategies.

- (1) If the unit is located in a property with fewer than six units, at the time of resale, the seller will repay to the Town the down payment assistance provided plus that portion of the net appreciation, if any (current market price minus original sales price,

appraisal fee, if any, brokerage fee up to five percent of resale price, and the depreciated cost of approved capital improvements) which reflects the proportion of public subsidy to total equity invested. Total equity consists of Town homebuyer assistance, owner down payment, owner pay-down of principal and, for consistency with HUD requirements, the cost of capital improvements referenced earlier. In no case will the owner be required to repay the Town more than the net proceeds for the sale, that is, the sales price minus non-HOME loan repayment and sale-related and closing costs.

- (2) If the unit is in a property with six or more units, the Town will have a right of first refusal at a price which represents the original purchase price, minus the subsidy, adjusted by changes in AMI or 80 percent of median income, whichever is lower, plus compensation for the depreciated cost of approved capital improvements, plus the amount in the condominium association's segregated capital replacement account attributable to the unit. In the event that the Town cannot exercise its rights, the seller will be free to sell on the market and repay the loan with shared appreciation in accordance with (1), above.

The Town will continue to use the Commonwealth of Massachusetts' Affordable Housing Deed Rider as a resale restriction for units which are offered – through inclusionary zoning, the State Chapter 40B program and/or various non-HOME subsidies. According to this deed rider, resale price is based upon increases over time in Area Median Income, adjusted by the commercially reasonable cost of approved capital improvements, depreciated over the remaining years of the owner's occupancy, as long as the price at resale is neither more than what a range of income-eligible buyers can afford nor less than the owner's initial purchase price.

However, where HOME funds are provided to a developer in order to acquire and rehab or build new units for sale at affordable prices, the Town will use a resale agreement running with the land that will provide the owner with a fair return on investment, while assuring that the unit will be affordable to a range of income-eligible buyers at least through the HOME period of affordability. Resale price will be the initial sales price plus the commercially reasonable cost of approved capital improvements depreciated over the remaining years of the owner's occupancy, plus return on investment. Investment will be defined as the original downpayment, annual contributions to principal, and commercially reasonable cost of approved capital improvements. Return on investment will be calculated as the sum of the annual interest on the owner's cumulative investment (without compounding), based on the interest rate of ten-year bond obligations of the United States Treasury.

With regard to repayment for capital improvements, capital improvements must be approved beforehand, and be of function and quality (or be so valued) consistent with the use of the housing as affordable housing. The capital improvements are those owned by the condominium owner (and not part of common space) and might include, for example, the replacement, due to damage or long term wear and tear, of windows, heating or hot water systems, and stove, refrigerator or dishwasher.

The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference. A resale price is within the range of income-eligible buyers if it is based upon what a household with a size which equals the number of bedrooms plus one and an income 10 percent below the relevant income limit can afford when spending no more than 30 percent of gross income on housing costs (mortgage, real estate taxes, home and private mortgage insurance, and condo fees), assuming current interest rates offered plus one quarter percent for a 30 year, no point fixed-rate loan with a down payment of five percent of total costs. Units that come up for resale will be targeted to low-income first-time homebuyers earning up to 80 percent of the Boston-Cambridge-Quincy MA-NH Area Median Income (AMI), as published by the U.S. Department of Housing and Urban Development, for the duration of the HOME Period of Affordability (*see affordability period chart at the beginning of Section 1*) and as consistent with the number of bedrooms in the unit.

With regard to the preservation of affordable rental housing, when providing funding to developers/owners of rental properties, the Town will continue to structure the subsidy as a long-term deferred interest loan, which may be extended if required for continued affordability, and to reserve for the Town a right of first refusal to purchase the property should the owner seek to sell.

### ***Framingham***

The City of Framingham employs a deed restriction to serve as a recapture mechanism for its HOME-funded downpayment assistance and housing rehabilitation programs. The Period of Affordability Chart identified in the beginning of Section 1 will apply. For both types of assistance, if the premises are sold, cease to be the mortgagor's primary residence or there is any change in the title during the term of the promissory note, which commences upon the completion date, or the mortgagor is not in substantial compliance with the promissory note and mortgage, the town will recapture the full HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the Mortgagor's investment.

### ***Natick***



The Town of Natick will use the recapture provisions for those housing units that are not intended to be listed on the DHCD Subsidized Housing Inventory (SHI), or do not qualify for the DHCD Local Initiative Program and/or Local Action Units. In these cases, the amount subject to recapture is the amount of the direct subsidy provided to the homeowner, and/or the difference between the fair market value of the property and a reduced sales price attributable to HOME development assistance. The HOME assistance will be recaptured in the full amount of the direct subsidy based on the availability of net proceeds which is defined as the sales price minus superior loan repayment (other than HOME funds) and any closing costs.

For those housing units that are intended to be listed on the DHCD SHI and/or qualify for the DHCD Local Initiative Program or Local Action Unit, the Town of Natick will use the resale provisions to ensure long term affordability. The Period of Affordability outlined at the beginning of Section 1 will apply. In these cases during the HOME period of affordability, the property must remain affordable to low income homebuyers spending no more than 30 percent of gross income on mortgage payments (PITI) and condo fees; and be sold at a price that provides the owner a fair return on investment. The sale of the property is limited to a credit-worthy eligible purchaser earning between seventy and eighty percent (70-80%) of the Area Median Income for an appropriate size household. During the initial 90 days of marketing, the Town will have a Right of First Refusal to purchase the property.

The basis for a fair return on investment includes the homebuyer's original investment and capital improvements and is dependent on a maximum sales price based on the change in Area Median Income (AMI) over the period of ownership. The maximum sales price is determined by taking the ratio of the original HOME assisted unit sales price over the purchase year AMI, and multiplying this number by the current AMI to get the current base sales price, to which is added closing costs and capital improvements. Capital improvements must be approved by the Town to be considered and are defined as a necessary improvement, not covered by a condo or homeowner fee, that if not done would compromise the structural or functional integrity of the original property. The value of capital improvements at the time of resale will be based on a depreciation schedule. The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference.

The City of Waltham enforces a recapture provision on all down payment assistance loans provided through the WestMetro HOME Consortium. If the premises are sold, cease to be the Mortgagor's primary residence or there is any change in the title during the term of the Promissory Note, which commences upon the Completion Date, or the Mortgagor is not in substantial compliance with the Promissory Note and Mortgage, the City will recapture the full

HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the Mortgagor's investment. The City specifically reserves the right to require full repayment, notwithstanding any deficiency in the amount of the net proceeds, in the event that repayment is triggered by a willful violation by the Borrower of the terms of the Note, or the Mortgage or any applicable HOME regulations. This recapture provision conforms to HUD HOME regulation 24 CFR 92.254 (a)(5)(ii). HUD defines the net proceeds as the sales price minus non-HOME loan repayments and closing costs. If the net proceeds are sufficient to repay both the HOME loan and the Borrower's investment (HUD defines Borrower's investment as the Borrower's down payment and any capital improvement investment), the City must recapture the full HOME loan. Please note, however, that when the net proceeds are insufficient to repay the full HOME assistance, the City will not permit the Borrower to recover more than his/her investment.

The Principal sum may be deferred annually by the City based upon annual review by the Lender of the Borrower's compliance with the terms of this Mortgage, the HOME program and HOME project funding agreement and the Promissory Note. The City of Waltham defines capital improvements as a necessary maintenance improvement, not covered by a condominium or homeowners association fee, that if not done would compromise the structural integrity of the property. To be considered a capital improvement, work should meet the following criteria:

- It is not a repair to keep your home in good operating condition.
- It is a new element or replacement of a permanent component of the home, which has reached the end of its useful life.
- It is not part of a common area nor covered by the condominium association fee. This applies to all condo-developed property. (If the condominium or homeowner's association has a special assessment, the City will take into consideration the cost to the homeowner on a case-by-case basis. Additional documentation will be necessary to provide proof of the special assessment.)

Repairs funded by any federal or state or local grant programs are not counted or approved. Improvements such as installation of outdoor decks, additions, garages, and landscaping are luxury improvements and will not be considered as capital improvements.

### ***Newton***

The City of Newton utilizes HOME Program funds for new construction and rehabilitation of homeownership housing, as projects arise. Direct downpayment assistance is provided through local Community Preservation Act funds. Newton uses a resale provision when HOME program funds are used for homebuyer activities, which is incorporated into an affordable housing covenants running with the land. The terms of the resale provision, which apply during the HOME Period of Affordability, are as follows:

*Long-Term Affordability.* All HOME-assisted units must be sold only to a buyer whose family qualifies as a low-income family earning up to 80 percent of the Boston-Cambridge-Quincy MA-NH Area Median Income (AMI), as published by the U.S. Department of Housing and Urban Development, for the duration of the HOME Period of Affordability. If an eligible buyer is not identified within the allotted resale timeframe the City may exercise a purchase option to ensure that the HOME-assisted unit is resold to a low-income family.

*Principal Residence Requirement.* The initial purchaser, and all subsequent buyers of a HOME-assisted unit, must use the property as his/her/their principal residence. Newton conducts annual monitoring to ensure this requirement is met.

*Resale Price & Fair Return on Investment.* If the HOME-assisted unit is sold by the owner during the HOME Period of Affordability, the resale price is calculated as the percentage change of 80 percent of the AMI, as published by HUD, during the term of ownership by the homeowner, plus approved Capital Improvements depreciated over the course of their usual life.

*Calculating Fair Return on Investment.* Fair Return on Investment is calculated by multiplying the initial purchase price of the HOME-assisted unit by a fraction, the numerator of which is 80 percent of the AMI as published by HUD as of the date of receipt of the owner's notice to sell the affordable unit (Conveyance Notice) and the denominator of which is 80 percent of the AMI as published by HUD as of the date of the initial closing, plus approved Capital Improvements, depreciated over the course of their useful life. The original homeowner's investment (e.g. any downpayment) is included as part of the initial purchase price.

*Capital Improvements.* Capital Improvements are elements which may add to the value of the unit or prolong its useful life, are of function and quality consistent with comparable affordable housing units, and are owned solely by the owner (not part of any common areas). Maintenance is not considered a capital improvement. The City must approve all capital improvements prior to costs being incurred. These approved capital improvements are subject to depreciation based on the remaining useful life of the element at time of resale. Improvements that are funded by federal, state or local grant programs are not eligible. Some examples of capital improvements include the replacement of non-operational heating or hot water systems, built-in appliances, installation of energy-efficient windows, and insulation.

*Continued Affordability to Homebuyers.* In accordance with the HOME regulations, Newton is obligated to ensure that the owner of a HOME-assisted unit receives a Fair Return on Investment and that the unit remains affordable to a range of income eligible households upon resale. To

maintain continued affordability, the City will target subsequent purchase to appropriately-sized households earning between 70 and 80 percent of the AMI spending no more than 35 percent of gross household income on fixed housing costs (principal, interest, property taxes, condominium fees, if applicable, and insurance), assuming current interest rates offered plus one quarter percent for a 30-year, fixed rate loan and a downpayment of 5 percent. If the resale price exceeds what an eligible household can afford, the City will subsidize the difference with downpayment assistance, mortgage buydown, or other subsidy, as appropriate. To be considered eligible, homebuyers will also be subject to an asset limit of \$75,000. However, any assets up to \$200,000 from the sale of a Newton residence shall be excluded from that determination (but still considered in determination of income eligibility) provided that:

- (a) the sellers must have been no less than 62 years old at the time of that sale; and
- (b) the sale of the residence must be an arms-length transaction.

### ***Waltham***

The City of Waltham enforces a recapture provision on all Down Payment assistance loans that it has provided through the WestMetro HOME Consortium. If the premises are sold, cease to be the Mortgagor's primary residence or there is any change in the title during the term of the Promissory Note, which commences upon the Completion Date, or the Mortgagor is not in substantial compliance with the Promissory Note and Mortgage, the City will recapture the full HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the Mortgagor's investment. The City specifically reserves the right to require full repayment, notwithstanding any deficiency in the amount of the net proceeds, in the event that repayment is triggered by a willful violation by the Borrower of the terms of the Note, or the Mortgage or any applicable HOME regulations. This recapture provision conforms to HUD HOME regulation 24 CFR 92.254 (a)(5)(ii). HUD defines the net proceeds as the sales price minus non-HOME loan repayments and closing costs. If the net proceeds are sufficient to repay both the HOME loan and the Borrower's investment (HUD defines Borrower's investment as the Borrower's down payment and any capital improvement investment), the City must recapture the full HOME loan. Please note, however, that when the net proceeds are insufficient to repay the full HOME assistance, the City will not permit the Borrower to recover more than his/her investment.

The Principal sum may be deferred annually by the City based upon annual review by the Lender of the Borrower's compliance with the terms of this Mortgage, the HOME Program and HOME Project funding agreement and the Promissory Note. The City of Waltham defines capital improvements as a necessary maintenance improvement, not covered by a condominium or homeowners association fee, that if not done would compromise the structural integrity of the property. To be considered a capital improvement, work should meet the following criteria:

- It is not a repair to keep your home in good operating condition.
- It is a new element or replacement of a permanent component of the home, which has reached the end of its useful life.
- It is not part of a common area nor covered by the condominium association fee. This applies to all condo-developed property. (If the condominium or homeowner's association has a special assessment, the City will take into consideration the cost to the homeowner on a case-by-case basis. Additional documentation will be necessary to provide proof of the special assessment.)

Repairs funded by any federal or state or local Grant Programs are not counted or approved. Improvements such as installation of outdoor decks, additions, garages, and landscaping are luxury improvements and will not be considered as capital improvements.

**Watertown**

Watertown, on any new projects using HOME funds, through the Watertown Housing Partnership, will use the Massachusetts Department of Community Development and Housing's Capital Improvements Policy and Procedures. Watertown uses a recapture provision which requires the HOME loan recipient to repay the loan, and, in some cases, a pre-payment penalty and a share in the appreciation in the project from the proceeds of the sale. The Period of Affordability Chart identified in the beginning of Section 1 will apply.

**2. A description of the guidelines for resale or recapture that ensures the affordability of units acquired with HOME funds? See 24 CFR 92.254(a)(4) are as follows:**

For those communities that have utilized HOME funds for homebuyer and homeownership activities, program participants are required to occupy the property acquired with assistance through the program as their principal residence for the duration of the Affordability Period, in accordance with **24 CFR 92.254(a)(4)**. The Affordability Period is determined by the amount of HOME financial assistance provided to the program participant, as detailed in the table below.

<b>Downpayment/Homebuyer</b>	<b>Affordability Period</b>
Less than \$15,000	Five (5) Years
\$15,000 - \$40,000	Ten (10) Years
Over \$40,000	Fifteen (15) Years

Period of Affordability Chart

***Bedford, Concord, Lexington, Needham, Sudbury, and Wayland***

These communities choose not to utilize HOME funds for newly constructed ownership units due to the conflicts between the State's affordable housing deed riders and the HOME Program rule, with respect to the resale and recapture provisions. This guideline has not changed since the submission of the FY16-20 Consolidated Plan.

***Brookline***

When providing homebuyer assistance, that is, funding directly to a homebuyer to purchase an existing unit at a market price, the Town will continue to pursue two different strategies.

- (1) If the unit is located in a property with fewer than six units, at the time of resale, the seller will repay to the Town the down payment assistance provided plus that portion of the net appreciation, if any (current market price minus original sales price, appraisal fee, if any, brokerage fee up to five percent of resale price, and the depreciated cost of approved capital improvements) which reflects the proportion of public subsidy to total equity invested. Total equity consists of Town homebuyer assistance, owner down payment, owner pay-down of principal and, for consistency with HUD requirements, the cost of capital improvements referenced earlier. In no case will the owner be required to repay the Town more than the net proceeds for the sale, that is, the sales price minus non-HOME loan repayment and sale-related and closing costs.
- (2) If the unit is in a property with six or more units, the Town will have a right of first refusal at a price which represents the original purchase price, minus the subsidy, adjusted by changes in AMI or 80 percent of median income, whichever is lower, plus compensation for the depreciated cost of approved capital improvements, plus the amount in the condominium association's segregated capital replacement account attributable to the unit. In the event that the Town cannot exercise its rights, the seller will be free to sell on the market and repay the loan with shared appreciation in accordance with (1), above.

The Town will continue to use the Commonwealth of Massachusetts' Affordable Housing Deed Rider as a resale restriction for units which are offered – through inclusionary zoning, the State Chapter 40B program and/or various non-HOME subsidies. According to this deed rider, resale price is based upon increases over time in Area Median Income, adjusted by the commercially reasonable cost of approved capital improvements, depreciated over the remaining years of the owner's occupancy, as long as the price at resale is neither more than what a range of income-eligible buyers can afford nor less than the owner's initial purchase price.

However, where HOME funds are provided to a developer in order to acquire and rehabilitate or build new units for sale at affordable prices, the Town will use a resale agreement running with the land that will provide the owner with a fair return on investment, while assuring that the unit will be affordable to a range of income-eligible buyers at least through the HOME period of affordability. Resale price will be the initial sales price plus the commercially reasonable cost of approved capital improvements depreciated over the remaining years of the owner's occupancy, plus return on investment. Investment will be defined as the original downpayment, annual contributions to principal, and commercially reasonable cost of approved capital improvements. Return on investment will be calculated as the sum of the annual interest on the owner's cumulative investment (without compounding), based on the interest rate of ten-year bond obligations of the United States Treasury.

With regard to repayment for capital improvements, capital improvements must be approved beforehand, and be of function and quality (or be so valued) consistent with the use of the housing as affordable housing. The capital improvements are those owned by the condominium owner (and not part of common space) and might include, for example, the replacement, due to damage or long term wear and tear, of windows, heating or hot water systems, and stove, refrigerator or dishwasher.

The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference. A resale price is within the range of income-eligible buyers if it is based upon what a household with a size which equals the number of bedrooms plus one and an income 10 percent below the relevant income limit can afford when spending no more than 30 percent of gross income on housing costs (mortgage, real estate taxes, home and private mortgage insurance, and condo fees), assuming current interest rates offered plus one quarter percent for a 30 year, no point fixed-rate loan with a down payment of five percent of total costs. Units that come up for resale will be targeted to low-income first-time homebuyers earning up to 80 percent of the Boston-Cambridge-Quincy MA-NH Area Median Income (AMI), as published by the U.S. Department of Housing and Urban Development, for the duration of the HOME Period of Affordability (*see affordability period chart outlined above*) and as consistent with the number of bedrooms in the unit.

With regard to the preservation of affordable rental housing, when providing funding to developers/owners of rental properties, the Town will continue to structure the subsidy as a long-term deferred interest loan, which may be extended if required for continued affordability, and to reserve for the Town a right of first refusal to purchase the property should the owner seek to sell.

**Framingham**

In Framingham, HOME-assisted units must meet the affordability requirements of five to 20 years beginning after project completion (*Please see affordability period chart outlined above*). The affordability requirements apply without regard to the term of any loan or mortgage or the transfer of ownership. They are imposed by deed restrictions approved by HUD. The deeds are structured to recapture funds when the following circumstances occur:

- If the premises are sold
- Cease to be the client's primary residence
- Any change in the title during the term of the promissory note, which commences upon the completion date
- Substantial non-compliance with the promissory note and mortgage by the client

When triggered, recaptures take back the full HOME loan or the net proceeds, if the net proceeds are less than the full amount of the HOME loan and the client's investment.

**Natick**

The Town of Natick will use the recapture provisions for those housing units that are not intended to be listed on the DHCD Subsidized Housing Inventory (SHI), or do not qualify for the DHCD Local Initiative Program and/or Local Action Units. In these cases, the amount subject to recapture is the amount of the direct subsidy provided to the homeowner, and/or the difference between the fair market value of the property and a reduced sales price attributable to HOME development assistance. The HOME assistance will be recaptured in the full amount of the direct subsidy based on the availability of net proceeds which is defined as the sales price minus superior loan repayment (other than HOME funds) and any closing costs.

For those housing units that are intended to be listed on the DHCD SHI and/or qualify for the DHCD Local Initiative Program or Local Action Unit, the Town of Natick will use the resale provisions to ensure long term affordability. The Period of Affordability outlined at the beginning of Section 1 will apply. In these cases during the HOME period of affordability, the property must remain affordable to low income homebuyers spending no more than 30 percent of gross income on mortgage payments (PITI) and condo fees; and be sold at a price that provides the owner a fair return on investment. The sale of the property is limited to a credit-worthy eligible purchaser earning between seventy and eighty percent (70-80%) of the Area Median Income for an appropriate size household. During the initial 90 days of marketing, the Town will have a Right of First Refusal to purchase the property.

The basis for a fair return on investment includes the homebuyer's original investment and capital improvements and is dependent on a maximum sales price based on the change in Area



Median Income (AMI) over the period of ownership. The maximum sales price is determined by taking the ratio of the original HOME assisted unit sales price over the purchase year AMI, and multiplying this number by the current AMI to get the current base sales price, to which is added closing costs and capital improvements. Capital improvements must be approved by the Town to be considered and are defined as a necessary improvement, not covered by a condo or homeowner fee, that if not done would compromise the structural or functional integrity of the original property. The value of capital improvements at the time of resale will be based on a depreciation schedule. The Town understands that, to the extent that resale price for a HOME-subsidized unit during the HUD period of affordability exceeds what a range of income-eligible buyers can afford, it may be obligated to fund the difference.

#### ***Newton***

Under resale provisions, all properties acquired through a development subsidy or receiving direct homebuyer assistance with HOME funds will have a recorded deed restriction stating the affordability period and the process for calculating the resale amount to ensure long term affordability to an income-eligible household during the affordability period. Additionally, any loan issued by the City is secured by a mortgage and promissory note.

#### ***Waltham***

Under recapture provisions, all properties receiving direct homebuyer assistance and/or rehabilitated with HOME funds will have a recorded mortgage stating the affordability period (*outlined above*) and the process for calculating the recapture amounts.

#### ***Watertown***

Under recapture provisions, all properties receiving direct homebuyer assistance with HOME funds will have a recorded mortgage stating the affordability period (*outlined above*) and the process for calculating the recapture amounts.

### **3. Plans for using HOME funds to refinance existing debt secured by multifamily housing that is rehabilitated with HOME funds along with a description of the refinancing guidelines required that will be used under 24 CFR 92.206(b), are as follows:**

No communities have plans to refinance existing debt secured by properties that have HOME funds in FY19 (FFY18).

## **APPENDIX: STANDARDS FOR PROVISION OF ESG ASSISTANCE**

# City of Newton Emergency Solutions Grant

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## WRITTEN STANDARDS FOR PROVISION OF ESG ASSISTANCE

### OVERVIEW

In accordance with federal regulations set forth in 24 CFR Part 567, the City of Newton's Department of Planning and Development has developed the following written standards guiding the provision and prioritization of Emergency Solutions Grant (ESG) funding.

The City of Newton receives ESG funds annually from the U.S. Department of Housing and Urban Development (HUD) under the Homeless Emergency Assistance and Rapid Transition to Housing Act of 2009 (HEARTH Act), enacted into law on May 20, 2009. The ESG program supports eligible activities that enable communities to prevent homelessness, identify sheltered and unsheltered homeless persons, as well as those at-risk of homelessness, and provide the supportive services necessary to ensure that homeless individuals and families are rapidly-rehoused and move toward independent living.

ESG provides funding to: (1) engage homeless individuals and families living on the street; (2) improve the number and quality of emergency shelters for homeless individuals and families; (3) help operate these shelters; (4) provide essential services to shelter residents, (5) rapidly re-house homeless individuals and families, and (6) prevent families/individuals from becoming homeless.

Newton's ESG funds may be used for the following eligible program components:

- **Emergency Shelter Services-** Essential Services for individuals and families currently residing in an emergency shelter; Shelter Operations generally include such operating costs as maintenance, rent security, fuel, equipment, insurance utilities, and furnishings; Renovation of a building to serve or that currently serves as an emergency shelter.
- **Homelessness Prevention-** Housing relocation and stabilization services and/or short-and/or medium-term rental assistance necessary to prevent the individual or family from moving into an emergency shelter or meets HUD's homeless definition.
- **Rapid Re-housing-** Housing relocation and stabilization services and short-and/or medium-term rental assistance as necessary to help individuals and families currently living in an emergency shelter or other places not meant for human habitation move as quickly as possible into permanent housing and achieve stability in that housing.
- **Street Outreach-** Essential Services necessary to reach out to **unsheltered** homeless individuals and families, connect them with emergency shelter, housing, or critical services, and provide them with urgent, non-facility-based care.

Service providers contracted with the City of Newton to provide services in conjunction with the Emergency Solutions Grant must become thoroughly familiar with all regulations promulgated by the United States Department of Housing and Urban Development (HUD) governing the Emergency Solutions Grant Program and the enclosed written standards. [See, in particular, 24 CFR Part 576 – Emergency Solutions Grant Program.] The provider is responsible for implementing the service in accordance with these regulations. The following standards are essential, but are not exhaustive of HUD requirements.

## **I. Standard Policies and Procedures for Evaluating Individuals’ and Families’ Eligibility for Assistance under ESG**

The Massachusetts Balance of State Continuum of Care (CoC) has developed and implemented a Coordinated Entry System, to facilitate the process of assessing the housing needs of individuals experiencing homelessness and meeting those housing needs. All applicants are processed through this standard centralized or coordinated assessment system, as required by HUD in 24 CFR 576.400(d). (Note: A victim service provider may choose not to use the Continuum of Care’s centralized or coordinated assessment system.) The goal of the Coordinated Entry process is to provide each consumer with adequate services and supports to meet their housing needs, with a focus on returning them to housing as quickly as possible.

ESG subrecipients and service providers, unless noted as an exception, are required to complete the BoS CoC Coordinated Entry Vulnerability Assessment, the Consent and Release Form and the Housing Preference Form. Assessment packets may be requested by calling DHCD at 617-573-1100 or downloaded from the CoC’s website at <http://www.mass.gov/hed/housing/stabilization/continuum-of-care-programs.html>. The evaluation contains the basic information about the barriers and vulnerabilities of each assessed person who has not yet been housed. Vulnerabilities incorporated into the list include length of homelessness, disabilities, and chronic medical conditions. Referrals to CoC funded Permanent Supportive Housing projects are made in order of vulnerability as vacancies occur.

Completed packets are then sent to Karla Sordia (the Coordinated Entry Registry), Federal Grants Management Unit, Massachusetts Department of Housing and Community Development (DHCD), 100 Cambridge Street, 3rd floor, Boston, MA 02114, or scanned and emailed to Karla.Sordia@state.ma.us. Once the project receives the referral from the Coordinated Entry Registry, they will arrange an intake interview. Coordinated Entry Staff will also contact the consumer to assure that the connection has been made. The project staff will review the referred person’s case for eligibility and may reject them only if they are found to be ineligible.

### *Ia. Emergency Shelter*

Applicants entering into the emergency shelter system must meet the HUD criteria for defining homelessness as described in 24 CFR 91.5 and 24 CFR 576.2 and in Attachment 1 entitled “Criteria for Defining Homelessness.” Clients will be prioritized within the shelter system based on need and available resources. Requirements are further described in Section IV.

*1b. Street Outreach*

Eligible clients include people who qualify as ‘unsheltered homeless,’ based on Category 1 (“Literally Homeless”) of the “homeless” definition found at 24 CFR 576.2 (and in Attachment 1, Criteria for Defining Homelessness). Services must coincide with requirements as outlined below in Section III and 24 CFR 576.101.

*1c. Homelessness Prevention/Rapid Re-Housing*

To be eligible for homelessness prevention, an applicant must meet the standards for r at-risk of homelessness as defined in 24 CFR 91.5 and 24 CFR 576.2. (Please also see Attachment 2, Criteria for Defining At-Risk of Homelessness) Further, applicants must have an annual income at or below 30% of Area Median Income (AMI).

<b>FY 2018 Income Limits</b>	
<b>Household Size</b>	<b>30% Extremely-Low Income Limits</b>
<b>1</b>	\$22,650
<b>2</b>	\$25,900
<b>3</b>	\$229,150
<b>4</b>	\$32,350
<b>5</b>	\$34,950
<b>6</b>	\$37,550
<b>7</b>	\$40,150
<b>8</b>	\$42,750

The standard that must be used for calculating annual income is established in 24 CFR 5.609. Applicants are eligible for future services only if they have no other housing subsidies from local, state, or federal sources and have no other viable resources to keep or obtain housing. The City of Newton may establish other priorities to be applied to applicants.

Program participants seeking rapid re-housing must meet HUD criteria for defining homelessness (Please see Attachment 1, Criteria for Defining Homelessness) and can be either be shelter or street homeless. If eligible, funds may be used to provide housing relocation and stabilization services and short- and/or medium-term rental assistance as necessary to help a homeless individual or family move as quickly as possible into permanent housing and achieve stability. Furthermore, participants within the Brookline-Newton-Waltham-Watertown region will be prioritized for homelessness prevention and rapid rehousing assistance.

*1d. Case Management and Re-evaluation*

Every eligible program participant or household is to be assigned a case manager or referred to an agency within the community that can provide equivalent care. It is required that the case manager or agency have experience in working with people who are homeless or at-risk of homelessness.

The case manager must work directly with each participant or household, to accomplish the following:

- Determination of the appropriate type of service needed and the amount of financial assistance that is required using guidelines approved by the City of Newton;
- Development of both a short-term and long-term service plan;
- Counseling concerning housing needs;
- Monitoring and evaluating program participant progress, meeting no less than once a month to assist the participant's long-term housing stability needs;
- Credit repair (including credit counseling, budget management, debt management, and making realistic financial choices);
- Communication with landlords and utility companies;
- Assurance that program participants are receiving necessary services from essential service providers, homelessness prevention and rapid re-housing assistance providers, other homeless assistance providers, and mainstream service providers, including schools, child care services, legal services, financial resources, health and mental health services, dispute resolution, etc;
- Obtaining all needed local, state, and federal services to benefit the program participant, including public housing, employment assistance and job training, SNAP, SSI or SSDI, TAFDC, Medicaid [*MassHealth in Massachusetts*], WIC, etc. The Case Manager is responsible for referrals and working agreements for on-going collaboration and cooperation. All program participants must have full access to mainstream resources; and
- The development of a longer-term housing stability plan to extend beyond completion of ESG support is required.

Case managers assigned to homelessness prevention and rapid-rehousing programs must also re-evaluate the program participant's eligibility for services and the amount of financial assistance required:

- No less than every three months for participants receiving homelessness prevention assistance;
- No less than once annually for participants who are receiving rapid re-housing assistance; and

At a minimum, Re-evaluations of each program participants' eligibility must establish that:

- The program participant does not have an annual income that exceeds 30 %AMI, as determined by HUD; and
- The program participant lacks sufficient resources and support networks necessary to retain housing without ESG assistance.

## **II. Policies and procedures for coordination among providers**

Recipients and subrecipients of Emergency Solutions Grants and funds authorized under the McKinney-Vento Homeless Assistance Act (Continuum of Care funding) must coordinate and

integrate, to the maximum extent practicable, funded activities and services with mainstream housing, health, social services, employment, education, and youth programs for which homeless and at-risk families and individuals may be eligible. Strategies must include continued collaboration between housing and service providers like the state Department of Mental Health, Department of Developmental Services, Department of Children and Families, Bureau of Substance Abuse Services, Newton Public Schools or applicable school district, local healthcare providers, transportation officials, workforce development, children/ family service providers and case management providers. Funded agencies will ensure that program participants access appropriate benefits and services, including, but not limited to Section 8, Public Housing, HOME Investment Partnership (HOME), the Workforce Investment Act, Women, Infants and Children Nutrition Program (WIC), the Supplemental Nutrition Assistance (SNAP) and Temporary Assistance for Needy Families (TANF) programs.

The City communicates and coordinates with the BoS CoC concerning all the relevant points of services to be provided, performance standards, and policies and procedures for the operation and administration of the HMIS. Additionally, funding allocations are aligned with the priorities, needs and strategies of the Continuum.

Except where statutorily exempt, all data on persons served and activities assisted under the Emergency Solutions Grant must be entered into the applicable community-wide Homeless Management Information System (HMIS) in accordance with the data and technical standards established by HUD. All staff must input pertinent data detailing all services provided into one uniform HMIS client data tracking system. In the case of victim services providers, however, data is to be entered into an alternative database. All data reported to HUD is to be compiled from HMIS or the alternative database. All provider agencies offering ESG services are responsible for overseeing the operation of the HMIS and assuring that all relevant data is entered in the system.

### **III. Standards for targeting and providing essential services related to street outreach**

ESG funded **Street Outreach** targets unsheltered individuals and families within the Brookline-Newton-Waltham-Watertown geography. As set forth in 24 CFR 576.101, funding may be used to provide the essential services necessary to reach out to unsheltered homeless people, connect them with emergency shelter, housing, or critical services, and provide urgent, non-facility-based care to unsheltered homeless people who are unwilling or unable to access emergency shelter, housing, or an appropriate health facility. Eligible services consist of engagement, case management, emergency health and mental health services, services for special populations and transportation.

Subrecipients must determine an individual or family's vulnerability and/or ability to access emergency shelter, housing or health care facility to ensure that assistance is granted toward those demonstrating the greatest need. After the initial assessment of needs and eligibility, activities consist of providing crisis counseling, addressing urgent needs and actively connecting homeless persons to information, referrals and resources.

Funds may be used to provide services for special populations, including youth, victims of domestic violence and people with HIV/AIDS so long as the costs are eligible as defined above.

#### **IV. Policies and Procedures for Admission, Diversion, Referral, Operation and Discharge by Emergency Shelters Assisted under ESG**

The **Emergency Shelter Services** component of ESG, as set forth in 24 CFR 576.102, may be used to provide essential services to homeless families and individuals in emergency shelters, to renovate buildings to be used as emergency shelter for homeless families and individuals, and to operate emergency shelters. Services generally consist of case management, child care, education services, employment assistance and job training, outpatient health services, legal services, life skills training, mental health services, substance abuse treatment services and transportation.

Subrecipients and service providers must conduct the initial evaluation and determine if individuals and families meet one of the four (4) categories of homelessness, as detailed in the attached and further defined in 24 CFR 576.2. Following the evaluation and program triage, service providers must determine whether the participant is to be admitted to emergency shelter, diverted to a provider of other ESG-funded components, like homelessness prevention or rapid re-housing and/or connected to applicable supportive services and mainstream resources. Once admitted, emergency shelter program participants must be reassessed on an ongoing basis to determine the earliest possible time that they can be discharged into permanent housing. Subrecipients must work with program participants regularly in identifying their most critical needs, housing and stabilization options.

In accordance with HMIS policy, all data must be logged on services provided, referrals and discharges. Additionally, all facilities must meet the minimum standards with regards to sanitation, safety, habitability and access as specified in 24 CFR 576.403 and Section VIII of the enclosed ESG Written Standards.

Funds may be used to provide services for special populations, including youth, victims of domestic violence and people with HIV/AIDS so long as the costs are eligible as defined above.

#### **V. Determining and Prioritizing which Eligible Families and Individuals will Receive Homelessness Prevention Assistance and which Eligible Families and Individuals will Receive Rapid Re-Housing Assistance**

Unlike other interventions, Prevention occurs before a household falls into homelessness. It is recommended that the highest priority applicants for homelessness prevention would be those living in a habitable unit but who have been notified in writing that they are being evicted within 21 days after the date of their application for assistance. Newton ESG **Homelessness Prevention Program** Subrecipients are responsible for screening and determining eligibility for homelessness prevention. Eligibility for ESG services must be determined based on the eligibility criteria established by HUD. Households who do not meet required ESG eligibility standards are not eligible for services.

Newton's ESG **Rapid Rehousing Program** provides assists with rent, security deposit and other financial needs as well as supportive services to help people enter into an apartment. The highest priority applicants for rapid re-housing are those currently homeless persons for whom a potential living unit has been identified and will be available in less than a month. Participants within the Brookline-Newton-Waltham-Watertown region will be prioritized for homelessness prevention and rapid rehousing assistance.



The case manager assigned to the program participant is responsible for determining the type of assistance necessary, amount, and duration of housing stabilization or relocation services to provide a program participant. In addition, the case manager is to be responsible to determine the type of service that is most appropriate for the program participant and the amount of financial assistance required. Financial assistance cannot be provided to persons who are already receiving the same type of assistance through other public sources. For instance, rental assistance cannot be provided to a person who is receiving tenant-based rental assistance or living in a housing unit receiving project-based rental assistance.

All housing must be determined to meet HUD’s minimum standards and requirements for habitability, sanitation, lead-based paint, and rent reasonableness.

Part of the financial evaluation of each participant is a calculation of net assets. Other than the value of an automobile and the worth of retirement savings accounts, if the participant has a net worth exceeding a threshold of \$15,000, the participant would need to pay 100% of rent, utilities, and other costs until his/her net worth drops below the threshold amount.

According to HUD policy, rental assistance cannot be provided if the rent exceeds the Fair Market Rent established by HUD, as provided under 24 CFR part 888, and must comply with HUD’s standard of rent reasonableness, as established under 24 CFR 982.507. The HUD Boston-Cambridge-Quincy Metro Fair Market Rents for FY18 and FY17 are identified below.

<b>Final FY 2018 FMRs By Unit Bedrooms</b>					
	<u>Efficiency</u>	<u>One-Bedroom</u>	<u>Two-Bedroom</u>	<u>Three-Bedroom</u>	<u>Four-Bedroom</u>
<b>Final FY 2017 FMR</b>	\$1,194	\$1,372	\$1,691	\$2,116	\$2,331
<b>Final FY 2018 FMR</b>	\$1,253	\$1,421	\$1,740	\$2,182	\$2,370

Eligible financial assistance may include housing search, rent application, security deposit, utility deposits, moving costs, first and last month’s rent and utility payments. A one-time payment of rental arrearage may be made for a period of up to six months. The provider may make rental assistance payments only to an owner with whom the provider has entered into a rental assistance agreement. The agreement must require that the owner provide a copy of any eviction action or any notice to the program participant to vacate the rental unit.

## **VI. Determining the Share of Rent and Utilities Costs that Each Program Participant Must Pay, if any, While Receiving Homelessness Prevention or Rapid Re-Housing Assistance**

It is expected that negotiations will be held with all relevant parties at the outset to determine:

- a) The type of financial assistance required and agreement of amounts and method of payment;
- b) The proportion of financial participation by the program participant; and

- c) Other specific commitments of the program participant (e.g. to work toward self-sufficiency).

Determinations of the share of rent and utility costs to be paid on behalf of a program participant must be made on a case by case basis. Program participants are expected to contribute as great a share of the cost of rent and utilities as is affordable to them. In addition, they are required to seek alternative sources of financial assistance.

Financial assistance allocations are to be determined on a month to month basis for the first three month period. After three months, a complete re-evaluation of the program participant who has received homelessness prevention services must be conducted by the Case Manager to determine the program participant's eligibility for services and to determine the participant's ability to increase her/his share of rental payments. A similar re-evaluation must be conducted every three months thereafter, as long as the program participant receives financial assistance. If the service is rapid re-housing, a re-evaluation of program participant status (re: eligibility) is required no more than one year from the initial evaluation. At any point during the provision of financial assistance, the program participant must be declared ineligible for further assistance if her/his income exceeds 30% of the area median income as determined by HUD or if it is determined that the program participant has other resources or support networks that would allow her/him to retain the housing without ESG assistance.

Other than the possible exception of payment of first month's rent and a required security deposit, program participants are required to pay some portion of rent, minimally 30% of the program participant's income. Income will be calculated by totaling gross wages on pay stubs received by the participant after application to the program. The participant's share of rental payments ideally should increase incrementally throughout the period of assistance. Hardship waivers to reduce or forgo contributions can be granted in extreme circumstances at the discretion of the case manager and/or agency. Requests for waivers must be reviewed and approved by a supervisor, with the appropriate documentation kept on file.

## **VII. Standards for Determining How Long a Particular Program Participant will be provided with Financial Assistance and whether and How the Amount of that Assistance will be Adjusted Over Time**

Rental assistance is to be provided for the least amount of time possible and will only be provided so long as the case manager determines it to be absolutely necessary in helping participant(s) regain stability in permanent housing. Normally, the maximum period of rental assistance will be nine months. Only in cases of extreme need will rental assistance will be provided for a full year. Regardless of the length of the period of subsidy, all program participants who are receiving rental assistance must have a legally binding, written lease for the rental unit that is between the owner and the program participant. A lease is not required in the case of a rental arrearage payment.

In general, assistance with utility payments is limited to emergencies, such as if it is necessary for a program participant to move into a new unit or if the utility arrearages are so great that a negotiated settlement must be made with the utility companies to avoid shut-off. Program participants must work with the case manager to negotiate a payment plan for utilities arrearages.

Meetings with the program participant, landlord or prospective landlord, and the case manager are to be held, as needed, to assure that the program participant or program participant household achieves stability in housing.

Due to the anticipated large number of eligible individuals and families seeking housing stabilization or relocation services, program participants may only receive benefits for one period of time, as determined by the case manager.

## VIII. Habitability, Sanitation, Safety and Lead-Based Paint Standards

All ESG subrecipients and service providers must adhere to federally required standards to ensure that shelter and housing facilities are safe, sanitary, accessible and adequately maintained for program participants.

In accordance with 24 CFR 576.403, all units in which program participants are receiving emergency shelter or housing assistance must meet HUD Habitability and Lead-Based Paint Standards. Subrecipients are required to complete the ESG Minimum Habitability Standards Checklist and Lead Screening Worksheet (please see Attachments 3 and 4). The only exception to this requirement is in cases where **only** security deposits assistance and/or rental arrearage assistance is being provided.

Assisted units must meet federal lead paint requirements if the unit was constructed before 1978 and if a child under 6 and/or a pregnant woman is or will be residing in the unit. Subrecipients must document these inspections using the Habitability Checklist. The habitability and visual lead inspections are not required to be completed by certified inspectors, but the unit must comply with ALL standards on the checklist, otherwise the unit will not be eligible to grant assistance.

The inspection must include, at a minimum:

- Verification of age of structure;
- Visual assessment and confirmation that paint surfaces are not chipping, cracking or peeling using the Habitability Checklist; and
- Verification that the unit has been de-lead or paint encapsulated from a Massachusetts approved de-leading vendor.

If a HUD approved inspection for Section 8 has been recently completed for the unit, a copy of that inspection report in the client's file is sufficient because the regulations governing Section 8 inspections are more stringent than those governing ESG inspections. A lead-free certification for a unit can also be used to satisfy the lead paint requirement.

Subrecipients are highly encouraged to complete an online tutorial on completing lead based paint visual inspections which takes approximately 20 minutes to complete and is described at: <http://www.hud.gov/offices/lead/training/visualassessment/h00101.htm>

Shelters must be accessible and should have a second means of exiting the facility in the event of an emergency. Every assisted facility must establish appropriate safeguards in order to meet the safety and shelter needs of special populations and enact the proper security precautions to those in its care. In addition, each shelter and housing unit must be maintained in a sanitary condition with each

program participant having access to sanitary facilities that are clean and in proper operating condition.

## **IX. Fair Housing and Affirmative Outreach**

Subrecipients and service providers must communicate and make known that the use of ESG funded facilities, assistance and services are available to all on a nondiscriminatory basis. Subrecipients are required to develop and implement affirmative outreach procedures and communication tools and materials in conformance with all federal, state and local fair housing statutes to inform persons without regard race, color, sex, age, disability, religious creed, familial status, national origin or ancestry, genetic information, marital status, veteran or military status, sexual orientation, gender identity or expression or status as a recipient of public and/or rental assistance, how to obtain access to facilities and services. Additional outreach measures must be taken to ensure that program outreach will reach those who wouldn't traditionally access such opportunities.

In addition, reasonable accommodations for persons with disabilities must be available in order to ensure disabled participants have an equal opportunity to utilize housing, including shelters, and receive essential services. Greater levels of accessibility may be required for some shelters in compliance with The Americans with Disabilities Act.

## **X. Matching Funds**

Subrecipients must match 100% of awarded ESG funds from non-ESG sources. The matching requirement may be met with cash contributions and/or non-cash contributions, including the value of any real property, lease, equipment, goods, or services contributed to the organizations applying for ESG funds. Non-cash contributions may also include the purchase value of any donated building. Matching funds may also include salary paid to staff (not included in the ESG award) and time contributed by volunteers to carry out the project.

If matching contributions include funds from the Continuum of Care Program or another federal program, the applicant must ensure that all laws governing those federal funds are followed and that matching requirements do not prohibit those use of those funds for match.

## **XI. Termination of Assistance**

As outlined in 24 CFR 576.402, the subrecipient may terminate assistance if the program participant has violated program requirements in accordance with a formal process established by the subrecipient. Termination of services may occur in situations where the participant violates program standards, misrepresents eligibility status, violates the lease agreement and engages in criminal activity. The subrecipient must exercise judgment, examine and document all extenuating circumstances in determining when violations warrant termination so that a program participant's assistance is terminated only in the most severe cases. The termination must be preceded by a due process recognizing the rights of individuals affected, to include, at a minimum:

- Written notification and clear statement of reasons for termination from the program;
- Opportunity to appeal to a third party; and
- Prompt appeal response.

Participants who are terminated cannot re-apply for services until all outstanding issues are cleared to the satisfaction of the City of Newton.

## **Forms and Attachments**

1. Criteria for Defining Homelessness
2. Criteria for Defining At-Risk of Homelessness
3. ESG Minimum Habitability Standards Checklists
4. ESG Lead Screening Worksheet
5. ESG Program Components Quick Reference
6. ESG Applicable Requirements for Rental Assistance and Housing Relocation and Stabilization Services Matrix
7. Balance of State CoC Coordinated Entry Forms

## **APPENDIX: FY19 CDBG-ESG-HOME BUDGETS**

**Newton Community Development Block Grant Program - FY19 Budget**

PROJECT #	IDIS #	Env. Review	Budget Code	Account	Projects	Letter-of-Credit (LOC) Budget	FY19 Program Income (Estimated)	Prior Year(s) Program Income (FY18)	Total Budget
<b>HOUSING PROGRAM</b>									
CD19-01A		Exempt	15X114	Various	Housing Program Delivery	\$300,000.00			\$300,000.00
CD19-01B		project by project	15X114	5796	Housing Rehabilitation and Development Program Fund	\$841,841.00			\$841,841.00
CD19-01C		project by project	15X114	5796C	Housing Program Rehab Revolving Loan Fund (estimated rehab loan repayments)		\$81,250.00		\$81,250.00
<b>HOUSING PROGRAM TOTAL</b>						<b>\$1,141,841.00</b>	<b>\$81,250.00</b>	<b>\$0.00</b>	<b>\$1,223,091.00</b>
<b>ARCHITECTURAL ACCESS</b>									
CD19-03A		project by project	15X114	586001	FY19 Accessibility Improvements-City Hall, First Floor ADA Accessible Bathroom	\$105,000.00			\$105,000.00
<b>ARCHITECTURAL ACCESS TOTAL</b>						<b>\$105,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$105,000.00</b>
<b>HUMAN SERVICES</b>									
CD19-05A		Exempt	15X114	5797	Barry Price Rehabilitation Center / Building Independence and Self-Esteem Through Employment	\$15,000.00			\$15,000.00
CD19-05B		Exempt	15X114	5797	Boys and Girls Club /Financial Aid for Teens and Families	\$16,000.00			\$16,000.00
CD19-05C		Exempt	15X114	5797	EMPath / Career Family Opportunity Program	\$43,025.00			\$43,025.00
CD19-05D		Exempt	15X114	5797	Family ACCESS of Newton / Social Mobility for Young Families	\$16,500.00		\$ 33,500	\$50,000.00
CD19-05E		Exempt	15X114	5797	Horace Cousens Industrial Fund / Emergency Payment for Families in Financial Crisis	\$10,000.00			\$10,000.00
CD19-05F		Exempt	15X114	5797	Jewish Community Housing for the Elderly / Caring Choices and Wellness Nursing for Low-Income Seniors	\$13,040.00			\$13,040.00
CD19-05G		Exempt	15X114	5797	Jewish Family & Children's Service/ Stabilization & Recovery Services for People with Mental Illness & Autism	\$13,025.00			\$13,025.00
CD19-05H		Exempt	15X114	5797	Newton Community Development Foundation / Resident Services Program	\$25,025.00			\$25,025.00
CD19-05I		Exempt	15X114	5797	Newton Housing Authority / Resident Services Program	\$20,400.00			\$20,400.00
CD19-05J		Exempt	15X114	5797	Plowshares Education Development Center / Tuition Assistance for Preschool and After School	\$13,025.00			\$13,025.00
CD19-05K		Exempt	15X114	5797	REACH / Individual Support and Advocacy including Emergency Hotline and Community Outreach	\$11,640.00			\$11,640.00
CD18-05L		Exempt	15X114	5797	Riverside Community Care / Mental Health Services Promoting Economic Mobility	\$36,025.00			\$36,025.00
CD18-05M		Exempt	15X114	5797	The Second Step / Residential and Community Programs for Survivors of Domestic Violence	\$35,000.00			\$35,000.00
CD18-05N		Exempt	15X114	5797	Newton Senior Center/Senior Fitness Program	\$13,025			\$13,025.00
CD18-05O		Exempt	15X114	5797	NWW Committee/Wednesday Night Drop-In	\$7,000			\$7,000.00
CD19-98D		Exempt	15X114	5797	Human Service Program Income Reserve**** (for FY20 projects- do not include in FY19 budget totals)		\$18,750		
<b>HUMAN SERVICES TOTAL (Cannot exceed 15% of current year LOC + 15% of prior year program income)</b>						<b>\$287,730.00</b>	<b>\$18,750.00</b>	<b>\$33,500.00</b>	<b>\$321,230.00</b>
<b>NEIGHBORHOOD IMPROVEMENTS</b>									
		project by project	15X114	586001	No Projects in FY19	\$0.00			\$0.00
<b>NEIGHBORHOOD IMPROVEMENTS TOTAL</b>						<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>PROGRAM ADMINISTRATION</b>									
CD19-09A		Exempt	15X114	Various	Program Administration	\$382,642.00	\$25,000.00		\$407,642.00
CD19-09B		Exempt	15X114	Various	Citizen Participation	\$1,000.00			\$1,000.00
CD19-99		Exempt	15X114	5797	Contingencies	\$0.00			
<b>MINISTRATION TOTAL (Cannot exceed 20% of current year LOC + 20% of current year program income- must also include Planning activities)</b>						<b>\$383,642.00</b>	<b>\$25,000.00</b>	<b>\$0.00</b>	<b>\$408,642.00</b>
<b>GRAND TOTAL ALL PROGRAM AREAS</b>						<b>\$1,918,213.00</b>	<b>\$125,000.00</b>	<b>\$33,500.00</b>	<b>\$2,057,963.00</b>
<b>FY19 CDBG Letter of Credit Funds from HUD B-18-MC-25-0019</b>						<b>\$1,918,213.00</b>			

**Newton Emergency Solutions Grants Program - FY19 Budget**

Project Number	Envir. Review	IDIS #	ESG PROJECTS	BUDGET CODE	ACCOUNT	ACCOUNT TITLE	ESG Funds
HES19-01A	Exempt		Bristol Lodge Men's & Women's Shelters -- Middlesex Human Service Agency	18A11418	5797	Grants	\$ 14,000.00
HES19-01B	Exempt		Transitional Residence Operations -- The Second Step, Inc.	18A11418	5797	Grants	\$ 20,000.00
HES19-01C	Exempt		Shelter Services -- Community Day Center of Waltham	18A11418	5797	Grants	\$ 13,000.00
HES19-01D	Exempt		Emergency Shelter Operations -- REACH	18A11418	5797	Grants	\$ 16,000.00
HES19-02A	Exempt		Homelessness Prevention -- Brookline Community Mental Health Center	18A11418	5797	Grants	\$ 48,000.00
HES19-02B	Exempt		Homelessness Prevention -- The Second Step	18A11418	5797	Grants	\$ 7,000.00
HES19-03A	Exempt		Rapid Re-housing -- Brookline Community Mental Health Center	18A11418	5797	Grants	\$ 20,000.00
HES19-03B	Exempt		Rapid Re-housing -- The Second Step	18A11418	5797	Grants	\$ 6,542.35
HES19-05A	Exempt		ESG Administration	18A11418	5797	Grants	\$ 11,719.65
<b>TOTAL</b>							<b>\$ 156,262.00</b>
<b>FY19 ESG Letter of Credit Funds E18-MC-25-0019</b>							<b>\$ 156,262.00</b>

FY19 ESG is a **.19% decrease** from FY18 (\$275,072.00)

\* The original allocation intended for Street Outreach was distributed amongst Homelessness Prevention and Rapid Re-housing programs.



## WestMetro HOME Partnerships Program FY19 Projects

Project #	Budget Code	Account Code	IDIS #	Environ. Review	PROJECT NAME/TYPE	FY19 Budget	FY18 Program	
							Income	Totals
<b>BEDFORD</b>								
HM19-01A	16T1141	5715	TBD	Exempt	Bedford HOME Administration	\$ 1,935.00	\$ -	\$ 1,935.00
HM19-01B	16T1141	5797		Project by Project	Bedford TBRA	\$ 19,345.00	\$ -	\$ 19,345.00
<b>TOTAL</b>						<b>\$ 21,280.00</b>	<b>\$ -</b>	<b>\$ 21,280.00</b>
<b>BELMONT</b>								
HM19-02A	16T1142	5715	TBD	Exempt	Belmont HOME Administration	\$ 4,578.00	\$ -	\$ 4,578.00
HM19-02B	16T1142	5797		Project by Project	Belmont Projects / Programs	\$ 45,780.00	\$ -	\$ 45,780.00
<b>TOTAL</b>						<b>\$ 50,358.00</b>	<b>\$ -</b>	<b>\$ 50,358.00</b>
<b>BROOKLINE</b>								
HM19-03A	16T1143	5715	TBD	Exempt	Brookline HOME Administration	\$ 24,127.00	\$ -	\$ 24,127.00
HM19-03B	16T1143	5797		Underway	Housing Development - JCHE	\$ 241,275.00	\$ -	\$ 241,275.00
<b>TOTAL</b>						<b>\$ 265,402.00</b>	<b>\$ -</b>	<b>\$ 265,402.00</b>
<b>CONCORD</b>								
HM19-13A	16T1144	5715	TBD	Exempt	Concord HOME Administration	\$ 2,610.00	\$ -	\$ 2,610.00
HM19-13B	16T1144	5797		Project by Project	Housing Development - Junction Village	\$ 26,110.00	\$ -	\$ 26,110.00
HM19-13C	16T1144	5797			Loan Repayment to Lexington	\$ (6,605.00)	\$ -	\$ (6,605.00)
<b>TOTAL</b>						<b>\$ 22,115.00</b>	<b>\$ -</b>	<b>\$ 22,115.00</b>
<b>FRAMINGHAM</b>								
HM19-09A	16T1149	5715	TBD	Exempt	Framingham HOME Administration	\$ 24,665.00	\$ -	\$ 24,665.00
HM19-09B	16T1149	5797		Project by Project	Housing Development	\$ 122,000.00	\$ 9,094.19	\$ 131,094.19
HM19-09C	16T1149	5797		Underway	Framingham TBRA Program	\$ 55,000.00	\$ -	\$ 55,000.00
HM19-09D	16T1149	5797		Underway	Framingham Homeowner Rehab	\$ 69,665.00	\$ -	\$ 69,665.00
<b>TOTAL</b>						<b>\$ 271,330.00</b>	<b>\$ 9,094.19</b>	<b>\$ 280,424.19</b>
<b>LEXINGTON</b>								
HM19-12A	16T11412	5715	TBD	Exempt	Lexington HOME Administration	\$ 3,805.00	\$ -	\$ 3,805.00
HM19-12B	16T11412	5797		Underway	Lexington Projects / Programs	\$ 38,050.00	\$ -	\$ 38,050.00
HM19-12C	16T11412	5797			Loan Repayment from Concord	\$ 6,605.00	\$ -	\$ 6,605.00
<b>TOTAL</b>						<b>\$ 48,460.00</b>	<b>\$ -</b>	<b>\$ 48,460.00</b>
<b>NATICK</b>								
HM19-11A	16T11411	5715	TBD	Exempt	Natick HOME Administration	\$ 4,307.00	\$ -	\$ 4,307.00
HM19-11B	16T11411	5797		Underway	Natick TBRA Program	\$ 43,070.00	\$ -	\$ 43,070.00
HM19-11C	16T11411	5797			Loan Repayment from Sudbury	\$ 4,830.00	\$ -	\$ 4,830.00
<b>TOTAL</b>						<b>\$ 52,207.00</b>	<b>\$ -</b>	<b>\$ 52,207.00</b>
<b>NEEDHAM</b>								
HM19-05A	16T1145	5715	TBD	Exempt	Needham HOME Administration	\$ 2,785.00	\$ -	\$ 2,785.00
HM19-05B	16T1145	5797		Project by Project	Needham Projects / Programs	\$ 27,845.00	\$ -	\$ 27,845.00
<b>TOTAL</b>						<b>\$ 30,630.00</b>	<b>\$ -</b>	<b>\$ 30,630.00</b>
<b>NEWTON</b>								
HM19-06A	16T1146	5715	TBD	Exempt	Newton HOME Administration	\$ 14,158.00	\$ -	\$ 14,158.00
HM19-06B	16T1146	5797		Project by Project	Newton Projects/ Programs	\$ 141,580.10	\$ 44,918.36	\$ 186,498.46
<b>TOTAL</b>						<b>\$ 155,738.10</b>	<b>\$ 44,918.36</b>	<b>\$ 200,656.46</b>
<b>SUDBURY</b>								
HM19-10A	16T11410	5715	TBD	Exempt	Sudbury HOME Administration	\$ 485.00	\$ -	\$ 485.00
HM19-10B	16T11410	5797		Project by Project	Sudbury Projects / Programs	\$ 4,830.00	\$ -	\$ 4,830.00
HM19-10C	16T11410	5797			Loan Repayment to Natick	\$ (4,830.00)	\$ -	\$ (4,830.00)
<b>TOTAL</b>						<b>\$ 485.00</b>	<b>\$ -</b>	<b>\$ 485.00</b>
<b>WALTHAM</b>								
HM19-07A	16T11417	5715	TBD	Exempt	Waltham HOME Administration	\$ 18,040.00	\$ -	\$ 18,040.00
HM19-07B	16T11417	5797		Underway	Waltham TBRA Program	\$ 180,402.00	\$ -	\$ 180,402.00
HM19-07C	16T11417	5797		Project by Project	Waltham Projects / Programs	\$ 455,768.00	\$ 455,768.00	\$ 911,536.00
<b>TOTAL</b>						<b>\$ 198,442.00</b>	<b>\$ 455,768.00</b>	<b>\$ 654,210.00</b>
<b>WATERTOWN</b>								
HM19-08A	16T11418	5715	TBD	Exempt	Watertown HOME Administration	\$ 8,995.00	\$ -	\$ 8,995.00
HM19-08B	16T11418	5797		Project by Project	Watertown Projects / Programs	\$ 89,945.00	\$ -	\$ 89,945.00
<b>TOTAL</b>						<b>\$ 98,940.00</b>	<b>\$ -</b>	<b>\$ 98,940.00</b>
<b>WAYLAND</b>								
HM19-14A	16T11414	5715	TBD	Exempt	Wayland HOME Administration	\$ 1,325.00	\$ -	\$ 1,325.00
HM19-14B	16T11414	5797		Project by Project	Wayland Projects / Programs	\$ 13,250.00	\$ -	\$ 13,250.00
<b>TOTAL</b>						<b>\$ 14,575.00</b>	<b>\$ -</b>	<b>\$ 14,575.00</b>
<b>CONSORTIUM ADMINISTRATION</b>								
HM19-99	16T11415	5715	TBD	Exempt	Consortium HOME Administration	\$ 47,920.30	\$ -	\$ 47,920.30
HM19-15A	16T11415	5797		Project by Project	Competitive Funding Pool	\$ -	\$ -	\$ -
HM19-15B	16T11415	5797		Underway	CHDO Operating Expenses Funding Pool	\$ 79,867.65	\$ -	\$ 79,867.65
HM19-15C	16T11415	5797		Project by Project	CHDO Set Aside Funding Pool	\$ 239,602.95	\$ -	\$ 239,602.95
<b>TOTAL</b>						<b>\$ 367,390.90</b>	<b>\$ -</b>	<b>\$ 367,390.90</b>

**TOTAL FY19 HOME CONSORTIUM BUDGET \$ 1,597,353.00 \$ 509,780.55 \$ 2,107,133.55**

**HOME Consortium Letter of Credit Funds M18-DC25-0213 \$ 1,597,353.00**

FY19 HOME is a 37.6% increase from FY18 (\$1,160,828)

HOME Projects and Programs	\$1,118,147.10
Total Administrative Costs (10% of total allocation)	\$159,735.30
Local Administration (7% of total allocation)	\$111,815.00
Consortium Administration (3% of total allocation)	\$47,920.30
Total CHDO Operating Expenses (5% of total allocation)	\$79,867.65
Total CHDO Set-Aside (15% of total allocation)	\$239,602.95
Prior Years Program Income	\$ 509,780.55
<b>TOTAL FY19 HOME CONSORTIUM BUDGET</b>	<b>\$2,107,133.55</b>

**APPENDIX: CITY COUNCIL RESOLUTION LANGUAGE**

CITY OF NEWTON

IN CITY COUNCIL

June 4, 2018

ORDERED:

That, in accordance with the recommendation of the Zoning & Planning Committee through its Chair Susan B. Albright, the following is hereby approved by the Honorable City Council:

**#268-18**      **Submission of the FY19 Annual Action Plan to HUD**  
HER HONOR THE MAYOR requesting City Council authorization to submit the FY19 Annual Action Plan to the U.S. Department of Housing and Urban Development (HUD) for the City of Newton Community Development Block Grant (CDBG), Emergency Solution Grant (ESG) funds and the WestMetro HOME Consortium.

Under Suspension of Rules  
Readings Waived and Item Approved  
23 yeas 0 nays 1 absent (Councilor Rice)



(SGD) DAVID A. OLSON  
City Clerk



(SGD) RUTHANNE FULLER  
Mayor

Date: 6/10/18



# Zoning & Planning Committee Report

## City of Newton In City Council

**Tuesday, May 29, 2018**

Present: Councilors Albright (Chair), Leary, Baker, Danberg, Brousal-Glaser, Kalis and Krintzman  
Absent: Councilor Downs

Also present: Councilors Gentile, Norton, Markiewicz, Greenberg, Kelley, Crossley, Cote and Noel

Planning & Development Board: Scott Wolf (Chair), Peter Doeringer, Sonia Parisca, Jennifer Molinsky and Christopher Steele

City Staff Present: Barney Heath (Director, Planning Dept.), James Freas (Deputy Director, Planning Dept.), Rachel Powers (Community Development Programs Manager), Maura O'Keefe (Assistant City Solicitor), John Lojek (Commissioner, Inspectional Services), Kathryn Ellis (Economic Development Director), Karyn Dean (Committee Clerk)

**#201-18      Zoning amendment to limit residential portion of business zone developments**  
**COUNCILOR GENTILE, MARKIEWICZ, COTE AND NORTON** requesting amendments to Chapter 30, Newton Zoning Ordinance, to require that any development in a business zone, limit the residential portion of the project to 50% of the total development.  
**Public Hearing Closed; Planning & Development Board Held 5-0**  
**Action:      Public Hearing Closed; Held 7-0**

**Note:** Councilor Albright opened the public hearing on items #201-18, #202-18 and #203-18. The Planning & Development Board opened their public hearing as well. Councilor Albright explained that the Planning Department would offer background information on moratoria and the Mixed Use 4 (MU4) district, and then Councilor Gentile would present the items. (Please see the notes below for the Planning Department comments.) She would then take public comment on all three items, simultaneously.

### Councilor Gentile Comments

Councilor Gentile explained that he is speaking as a concerned resident of the City on these items. He wanted to assure homeowners and small business owners along Washington Street that item #203-18 requesting a moratorium, would not affect them. The item is directed at the large developments that are being proposed along the Washington Street corridor.

He noted that the Austin Street and Washington Place projects approved through MU4 were contentious and divisive. Both were approved by the City Council by a small margin and he did not believe that was wise policy for making land use decisions. Now that those projects have begun, he felt it was a good time to arrange a forum for residents to speak to the Councilors about these types of projects going forward.

Councilor Gentile wanted everyone to understand that any financial success that he has ever had in his life is tied to the financing of residential properties. He fully appreciates the place for development and does not want people to think that he is against all development because that is simply not the case. Development and modernization is inevitable, but the appropriate level must be determined.

Councilor Gentile indicated that he is not looking for a vote at this meeting and would primarily like to hear from the public. He will then meet with the other docketers of these items to determine what, if anything, they would like to propose to the Zoning & Planning Committee going forward.

**#202-18      Zoning amendment to Mixed Used 4 district**

COUNCILOR GENTILE MARKIEWICZ, COTE AND NORTON requesting amendments to Chapter 30, Newton Zoning Ordinance, so that the Mixed Used 4 (MU4) zone is either eliminated; or the dimensional controls are reduced; or a moratorium of two years be placed on any new MU4 development; or any combination of these three action.

Public Hearing Closed; Planning & Development Board Held 5-0

**Action:**      **Public Hearing Closed; Zoning & Planning Held 7-0**

**Note:** James Freas, Deputy Director of the Planning Department, provided some background on the Mixed Used 4 (MU4) district at the request of the Chair. The MU4 proposal originated with the Austin Street Development site. The only district that would have been large enough to encompass that project was the existing Business Use 4, however, it was not appropriate for a village center as it allowed for the most intense density and building height of any district in the City. MU4 was created to be Newton's "village district" by working with the Zoning & Planning Committee and using the analysis provided by the Austin Street Working Group, as well as looking at existing conditions of other villages in the City. From the beginning, it was designed as a district that could only be applied by legislative act and special permit by the City Council and can only be applied to be specific projects. Therefore, it does not appear on the zoning map of the City except for Austin Street and Washington Place. The MU4 district was approved by the City Council in the fall of 2012. More information is included in the Planning Memo for this item, which was attached to the agenda.

**#203-18      Zoning amendment for moratorium on zone changes/construction Washington St.**

COUNCILOR GENTILE AND NORTON requesting amendments to Chapter 30, Newton Zoning Ordinance, to adopt an immediate moratorium on any zone changes and/or construction/development along both sides of Washington Street, including

abutting properties, from the intersection of Commonwealth Avenue Washington Street in Auburndale/West Newton, to the intersection of Washington Street and Centre Street in Newton Corner. This moratorium shall remain in place until Zoning Redesign and the proposed “actionable plan for the Washington Street Corridor” are completed. This moratorium does not apply to by right construction/development that is currently allowed by the Newton Zoning Ordinances. This moratorium shall expire on September 30, 2019.

Public Hearing Closed; Planning & Development Board Held 5-0

**Action:** Hearing Closed; Zoning & Planning Held 7-0

**Note:** James Freas, Deputy Director of the Planning Department explained that moratoria are used in certain extraordinary circumstances to temporarily halt activities of a certain type. The idea is to provide a “time-out” in order to place controls or mitigation measures in place. Most are targeted towards non-discretionary issues because otherwise the City Council can have more control. There must be a clear and defined timeframe and end point; there should be a precise target such that the issue is narrowly defined; and there should be an identified objective of the work to be accomplished during the moratorium. More information is included in the Planning Memo for this item, which was attached to the agenda.

### Public Comment

#### In Favor of Docket Items

Priscilla, Newtonville said she has lived here for 50 years and she is pro-development, but on a human scale. The thought of high-rises all along the Washington corridor is staggering. She was concerned that one developer was in control of so much property in the area. She wanted to know who would pay for services when these units are occupied – this would include schools, security, infrastructure. Will this be in the laps of the residents for the next 50 years. At least 40,000 residents in Newton are seniors and it would be difficult to cross the street when the traffic is multiplied. The human cost of this has to be considered.

Cindy Spittel, 74 Fenno Road thanked Councilor Gentile for docketing these items. As a fourth generation Newton resident, she feels the City is already in total gridlock without adding 1,000 new units. The schools are filled to capacity. She does not feel a moratorium is going backwards, she sees it as time for a through process. Newtonville was railroaded through and there is no parking and you can’t drive across the city in less than 40 minutes. The Mayor’s opinion, although she is wonderful, leaves out the rest of the City.

Darcy Morales-Zullo, 93 Randall Park said she supports these proposals. She loves the distinct villages in the City and the proposed developments would take so much character away from them. Her 96 year old father is very concerned as well. She felt this meeting was imperative to hear from the residents of the City. There is so much traffic in Newton and the schools are bursting at the seams and she is concerned about skyscrapers in the City. She is all for affordable housing but she feels time needs to be taken to look at the impact on every citizen of the City.

Margery Weider, 31 Judkins Street thinks it is important to slow down the process so people can heard and can consider the unintended consequences of not having a moratorium. She questions the affordable housing gig – who is this affordable for? The amounts do not seem affordable for most people. Schools are already overcrowded, traffic is terrible and the developer of Orr Block was not willing to kick in to improve the accessibility of the T. She did not see how that would now suddenly happen. She was the PTO president at the Carr School at the time of school building closings and everyone was assured there would be no problem with that and then there were problems after that. This needs to slow down.

Ernest Loewenstein, 57 Hyde Street supported these items and said it is not necessary to rush ahead with special permit after special permit. These developments are not going to make any significant difference for older people. Also, Newtonville does not have any transit oriented development. There are a few trains that go to Boston and back which are inconvenient except for commuting, and it has a bus every half hour or hour or more. There is not going to be any improvement in transportation and the MBTA has already said that. To step back and let the process cool off for a year to get these on the table in a rational way is a decent and honorable course of action.

Ellen Ryan, 29 Davis Ave said the community has already started to see the effects of the anticipation of building. There are parking problems and West Newton has not even begun construction yet. The CVS and Santander parking lots will be lost. She is concerned when the City is looking for a new site for a Senior Center and a police station and yet a developer can find these huge blocks of property to use for his own. She does not understand why the City can't find space. The developer has a vision for Washington Street and she want the vision to be from the community and those that live in the area. The Mayor has hired a consultant to help determine the direction, which is a good idea, but she supports these amendments. She has not heard anything about the impact on the schools. Newton South is at the capacity. She would rather not go through any problems with school buildings and adding that burden to the taxpayers. She thinks there needs to be some time to develop a unified vision, otherwise, every time a project comes up, there will be conflict.

Pamela Geib, 7 Briar Lane is surprised as some of the language being used tonight. The moratorium would be in place for just a little more than a year. Common sense has been lacking for West Newton all the way to Newton Centre because a billionaire developer on what he calls the meat left on the bone of housing development. Those were his words. This is a very fast train and it went undigested when she said everyone should wait to see how the project at Austin Street turned out before approving another big project. That information should be used to determine what should come next and then did not happen. There are two huge projects going on within two blocks of each other. The traffic is terrible and it is dangerous to cross the street. She is concerned about school and the quality of life. Many small businesses have been lost that have meant a way to her quality of life. She does not want to see more of that lost in other villages and get caught up in a developers vision.

Tarek Lucas, 36 Central Avenue said he is not speaking on behalf on the Newtonville Area Council. He supports the proposals because MU4 has further divided a City that was already divided. It has pitted neighbor against neighbor, parent against parent and city councilor against city councilor. There is either an anti-development or irresponsible development folks. The name calling has to stop and it is not way to build a city. MU4 has helped destroy the community he lives in, Newtonville. He supports the elimination or scaled back version of MU4.

Chris Pitts, 1756 Beacon Street supports the proposals. He is from Waban and on the Waban Area Council. A survey was done by the Council and the results showed that 70% said they like the villages just the way they are. It is part of what they like about Newton and distinguishes it from others in the greater Boston area. Moratoria have their place and it is just a pause to consider what is being planned. Some consultant work and surveys are being undertaken and that data will be helpful. Increasing the number of housing units does not lower costs and there are no examples of that. Supply and demand does not apply to land.

Pam Shufro, 20 Blithdale Street said she supports the moratorium. A comprehensive vision is needed on what is needed on that corridor. A moratorium will give us time to get that vision in place, not based on anecdotal stories but with really hard data. There is a consultant to do something, but certainly it should involve scientific data collection along with a scientifically random sample demographically based and analyzed survey of what the residents of Newton, where they live, who they are, how old they are, how much money they make and what they can afford for a market rate rental apartment. That is the kind of data needed. Of course we want affordable housing and accessible housing. She is a senior and her husband has a disability, but she doesn't think what they are going to get with the blunt instrument of "the market forces say this". If at 350 a square foot, according to Mr. Korff's calculations, for rents now, not the future, that comes out to \$48K a year for an 1,100 square foot 2 bedroom apartment. If 80% of the apartments cost that, could people afford that for their families, and could seniors on social security afford that? There is a lottery for less expensive units and there are so many, that not everyone can get one.

Adel Foz, 16 Page Road said he has lived there for about 45 years and spent 37 years doing traffic and transportation studies for neighborhoods, corridors, cities and regions all over New England. He supports the moratorium so that the traffic and transportation situations can be figured out. High end apartment owners have cars and they drive them. He thinks a traffic study is needed because this is a major corridor for traffic. Newton is not an island and it takes more than two intersections to make this work. A study has to look at the whole corridor.

Fred Arnstein, 7 Briar Lane supports the amendments. He was very interested in what James Freas said because he did not realize that the MU4 designation is a site-by-site designation. It is interesting to see that in the cases that it has come up for vote, it has been approved both times. The fear is that it will set a precedent for other properties and would be voted in automatically in other places. He does not see any reason to doubt that based on conversations he has had. The



amendments are the right thing to do. He sees that people who want development are saying go for it without restraint. Those who want more reasonable development are more thoughtful.

Edgar Klugman 65 Kirkstall Road said he has lived there since 1977 and had lived in England, Germany, Afghanistan and many other countries before. We are so fortunate to be able to have this council meeting and to be able to voice our opinions. In many other places, he could not speak and his voice was not heard. This is a treasure and the community is extremely bright and gifted. He would like to hear more about children and intergenerational and boundless playgrounds so that those who are challenged physically can use them. It was unclear whether he was in favor or opposed to the amendments.

Nancy Patriacca, 110 Nevada Street said she hopes the leaders and constituents will have a pause in the rush to redevelop Newton. She is not sure if the moratorium is needed but she is in favor of the spirit of it. She is not alone in her concern that the development is happening too quickly. She went to the Mayor's kick-off event for Hello Washington and she valued the exchange of ideas. She was interested in trees and density and one of the tables was talking about finance. One gentleman said the City is in debt and there would be more income if the developer would include more businesses and office space, and the School Department is already worried about too many kids and not enough space. She said everyone is talking about affordable housing but what about affordable housing for those who already live here and working class families and middle class families or those who are retired and age in place. Too many apartments will add more kids to the schools. It is important to be mindful of affordability on that level as well. She is not against development and she is for affordable housing but those who already live here have to worry about increased tax bills. Let's not let the developers make their money and leave the residents with the bill.

Wendy Plezniak, 38 Waban Street said she learned this year how important it is for citizens to get out in front of their issues early and discuss them with City Councilors. Developers are adept at what they do, marketing their projects, promising solutions to a city's problems. Members of this Committee may forget how most people who live here have never reached out to government and do not know how to navigate the city's website and understand how to come forward and make their voices heard. It takes time for neighbors and communities to talk to each other and craft their opinions in a coherent matter and mesh their concerns together before they stand before you. This is a human process and all the constituents have busy lives, as Councilors do. Developers are adept at the process and she wanted councilors to remember that there are groups of people that take time to plan well and act. She is grateful for these amendments and she wants to slow down projects to accommodate the human pace.

Paul Snyder, Arbor Road said he lives a block off of Washington Street and he has made a good part of his living with real estate development. As an attorney he has represented developers, and as associate regional counsel for private market finance at HUD for 15 years, he personally closed thousands of Section 8 and Section 236 housing units around New England. Housing development is important, however, housing development has to be done in a reasonable and moderate manner

and cannot be done at the point of a gun and facing the severe economic pressures of real estate in this community. A moratorium makes sense and he asked the committee to support it.

Lorraine Stannick, 411 Newtonville Avenue said she and her husband have lived in Newton for 36 years and she supports the proposals. There are many critical needs that need further discussion such as impacts on school, transportation and livability. She lives one block from Washington Street and Austin Street and it will have a big impact on the entire City of Newton. All of Washington Street will be covered with large buildings and it won't be the city they moved into.

Daniel Lawry, 33 Waban Street said there should be a moratorium on MU4 because there have been at least 3 major developments in the last year and have pushed their vision on Newton. Citizens have been trying to figure out how to express their opinions to the City Council and there has been large public opposition to those projects and yet the projects have been pushed through anyway without any plan from the City Council as to how the commercial space should be utilized. The City Council needs to make a plan that is driven by the residents. He is in favor of all three proposals.

Peter Harrington, said he supports these proposals so that there is an opportunity to step back from the onslaught of development and to gather information. The question is what kind of changes are coming and will they be drastic and will it protect the interests of the residents. The City Councilors names will be on these changes and he assumed they want to do the best they can. When things are rushed they end up with mistakes. The availability of information allows people access to more knowledge than ever before and that knowledge can be overwhelming as well as helpful. There are 3,500 units that are proposed for construction in the near future and include Riverside, West Newton, Newtonville, California Street and Needham Street. Limiting residential is not a bad idea in each project. There is not enough commercial base to support the current residents and there will be even less to support the new residents. He provided some pictures for the City Council to look at.

Name and address inaudible. The speaker said all the talk about affordable housing is driving her crazy. She lives on \$1374/month on social security. She has lived on the edge of poverty her entire life despite the fact she has a bachelors degree, a nursing diploma and a degree in nursing. She left nursing in 1997 because of medical issues she was making \$22/hour. She has lived in supportive housing her whole life and if she had not she would not have been able to work with low income people in low paying jobs. She canvassed people in the City and found that almost no one can live in Newton. Housing for seniors is a 6-10 year wait and none of these units proposed are affordable. If you want affordable housing, build affordable housing. (rest of testimony is inaudible).

James Pacheco, comments attached.

Margret Shefler, 77 Fairway Drive supports Councilor Gentile's amendment and ask that the Committee strongly consider voting for that.

Annie Raines, Court Street . Nantucket and Cambridge have been transformed by developer's vision. These towns once held police officers, teachers, architects, musicians, etc. people with disabilities, senior citizens, and children. Through development these communities were priced out of living in those towns. I am in favor of two out of three. I am ambivalent about the first one. I think it is hasty. However, I believe the moratorium amendments of either two years or so would be incredibly valuable in allowing public discourse to take place. Why we can't we have a bus depot in Newton Corner? If Newton becomes more like Cambridge, we could not live here. Please consider two out of three proposals.

Elaine Arruda, 921 Commonwealth Avenue said she met a family that instead of Newton decided to move to New Hampshire. They had concerns regarding high density development that would crowd schools and increase taxes. I shared those concerns and here to support the docket item for eliminating a moratorium on zoning. Current zoning allows too much leeway on height and too much residential versus commercial units. Her preference is for 3 story maximum in village centers and a higher percentage of commercial versus residential. It is unfair for residents to shoulder the burden of covering all the cities expenses. Housing is cash negative for Newton. Commercial is cash positive. We should be the ones to shape Newton's future, not the developers.

Bill Roessner 1058 Walnut Street said he is in support of the moratorium. The elephant in the room is deficit that we seem not to be able to pay for residential real estate taxation. The vision on the developer's part is dollar signs. I think the Council owes it to the citizens to look into this moratorium further.

Diane Prunte, 305 Winchester Street said she is in support of the docket items and is concerned about Newton affording the proposed building. She would like a public explanation of how this all can be afforded and to take a step back and think about what we are doing. We should not be giving any more approvals until we figure out our vision.

Amy Wayne, 1616 Centre Street, Newton Highlands said she approves of these docket items. The Planning needs to go first and it feels waiting will not harm the city.

Helen Nayar, 75 Grove Hill Ave. said that those who were around for Austin Street, remember it was ad hoc and we have not seen the results of MU4. She thinks we should stop and approve Mr. Gentile's proposal on a moratorium. We have to know what we are doing because what we do will effect each and every resident of this town. As a senior, she said these huge developments which give huge profits to developers have a diverse effect on the taxes on the seniors who live here. She has not seen much analysis and would like to see someone segment our population and tell us what the effects of these huge developments are going to be on our taxes.

Margaret Ward, Washington Street in Newtonville said all her needs and services were met living in Newtonville. Her concern is that this massive development will destroy the very fabric of the villages. Trades people will lose their jobs. Why is it that high density is the only solution to

provide affordable housing? She would like to see the Orr building not get demolished. This developer is about leveling, demolishing and building cheaply.

Julia Malakie, 50 Murry Road, West Newton said she strongly supports all three provisions. She thinks it is folly to allow any more commercially zoned land to be lost when we are in the situation that we are in. She wishes we could repeal MU4 but doesn't expect that, but there should be a pause to evaluate to the extent we can see the effect of the MU4's that have already been approved. She opposes the \$500,000 no-bid contract and thinks that was a mistake and wrong to be rushed into it. It seems the height of illogic and hypocrisy to let the process go through. She is trying to have people come to meetings and participate in that process and urges people to show up, write letters and if they don't do it, there is no resistance at all. Even if someone is pro high density development, they should be supporting the moratorium until September 2019 to allow the zoning re-design and the principal process to finish. She finds it ironic that so many people are against these docket items cite the Hello Washington Street process.

George Mansfield, 312 Lake Avenue, Newton Highlands was very impressed with the people who spoke from their hearts. They spoke with knowledge, and spoke with important questions. He supports these amendments and thinks MU4 has been in place from 2009 or before. The heart of a plan crafted in three or four years and supports conserving the quality of village centers, services, and the kinds of planned use, housing availability, is one of the key factors that MU4 does not look at. MU3 and MU4 were overlay districts to allow development on parcels that were under developed, such as the Riverside parcel, the Chestnut Hill parcel, and the Needham Street project. They did not anticipate MU4 taking affordable housing, existing small businesses so he urged spending a lot of time and look at the history of this and use that for the context of your decisions.

Kathleen Kouril Greiser, 258 Mill Street, Newtonville said she is in support of all three items, mostly in support of the elimination of the zoning category MU4. She thinks MU4 was a well-intentioned mistake. What we are opposed to is bad change, change that hurts Newton. Change that hurts the people of Newton, change that worsens our debt, change that is not sensible. Mr. Gifford brought up a laundry list of things. She absolutely supports the elimination of zoning category MU4. She supports a moratorium, zoning changes that would scale it down and lead a smaller percentage of residential. We are going through this thirteen month, Hello Washington planning process that we spent a half million dollars of money on and it is meaningless if Mr. Korff can submit zoning change applications and special permit applications during the remaining twelve month period and those are set in motion before we finish the process. It makes a mockery of the process. We are going to have our entire Zoning Ordinance rewritten, to get ahead of people like Mr. Korff but Mr. Korff is still free to keep submitting applications during this time. If you really want to give our Planning Department and our Law Department the time to properly write a new Zoning Ordinance, wouldn't it make sense to do something to stop Mr. Korff in the interim? She thinks MU4 is kind of a development dream category. It allows so much profit on high priced, high density, wood framed luxury apartments where so many of the costs are associated. These costs are externalized onto local citizens. Creating MU4 has not led to vibrant or inclusive village centers but to evictions, closure of small businesses, demolitions, anguish and strife. Thriving Newtonville is being demolished right now. MU4 is replacing the commercial tax base with high density, residential, at a

time when we are in more than a billion dollars in debt. It cannot be justified. The people who say you have to build high density housing make no sense. This is property speculation; it is not about affordable housing and if you didn't read the article in which Mr. Korff referred to us as the meat on the bone, I urge you to do so because we deserve better.

Jessica O'Rourke, 305 Albemarle Road said the conclusion she draws is that public input about the measures that are proposed tonight will go on in parallel with the process of issuing permits to developers to build along Washington Street and it would seem to be not the right order. Those two should be sequential, rather than parallel. The voters in the past approved a non-binding ballot initiative to require public input for city owned, tax payer owned land that was surplus and sold to developers and my understanding is that process is going on now for West Newton and taking public input on selling the park and the ground around Police Headquarters has not taken place and it would seem to be against the ballot initiative and the request passed by voters in that initiative.

Tony, 305 Albemarle Road said he was there because he thinks the Councilors all look pretty bad. Someone just made the comment, "that you don't have to approve everything this developer has asked" but that is what you do and he is not holding his breath that the Council is not going to do that every time. He thinks a moratorium is just a good beginning for how you should be looking at this. Permits should be incredibly rare, especially when they are opposed. One after the other is approved.

Virginia, 27 Taft, West Newton is encouraging the Committee to support the amendments, all three of them. One of the big things that she has a problem with is she sees no objectives that have metrics and numbers with them. She asked this of the Hello Washington people and they could not give her what was their vision and objectives were. Once you get objectives, you can make the plan but until you have objectives you cannot really make a plan to achieve anything. The second thing is the Police Station. Washington Street has two entrances and exits to the Pike. One reason we see low violence is because of the visibility of the Police Station. She doesn't understand the objective of moving the Police Station other than wanting a new building. Villages should have more voice on what is being done on Washington Street than the other villages. She doesn't hear anyone talking about developing Route 9 to achieve some of these objectives and she thinks that is another opportunity. She is not against building, not against advancing the cause, and interested in having the villages have their character and maintain their opportunities.

Mary, said she was told recently by someone that what Newton was looking at as low income would be considered \$80,000 and less which I think is a nice income. What about the people that live in Nonantum, and surrounding areas, seniors, disabled, people on fixed income who do not meet those requirements of \$80,000 or less? She is one of those people. She would like to make more money than she makes, for sure. She did not think the Councilors were taking into consideration the low and moderate income people and families and did not think they are thinking of the community as a whole. The villages are beautiful, and she agree that there could be some type of changes but everyone needs to be spoken to first. Nonantum is more crowded. Newtonville is crowded. We need to discuss the marijuana dispensary; how does everyone feels

about that? She is opposed to that. We are not thinking about the integrity of our city. What about people like me, what about our seniors? The schools are overcrowded

### **Opposed to Docket Items**

Jini Fairley, ADA Coordinator, City of Newton, said she works everyday with people with disabilities and those who are aging who are acquiring age-related disabilities and many are of them are searching for accessible and affordable housing. Whenever there are restrictions on development, it eliminates more and more appropriate units. She also explained that more businesses need to be accessible. She submitted written comments as well, which are attached.

Lois Levin, 407 Chestnut St, comments attached.

Michael Scott, Nutter McLennen and Fish, representing Mark Development, comments attached.

Marcia Johnson, 39 Bemis Street said that she was opposed to these proposals. The City needs to do a better job of planning for the future, creating housing opportunities, supporting the village centers in the e-commerce economy and thinking progressively about transit-oriented development. Not everyone agrees with that, but the approach of this moratorium could be seen as an abdication of the Council's obligation to tackle those tough issues. The City is in the position it is because it has been slow to translate the concepts from the Comprehensive Plan into zoning standards and to see that the current economic climate makes Newton an attractive place to live for a diverse set of people. She can only think the moratorium on projects on Washington Street and limits on MU4 projects is designed to stop change, not take time for a more thoughtful planning process. Many of the existing zoning tools are clunky but they can work to make sure the city gets what it needs from the biggest project proposals. She can almost guarantee that a moratorium and limitations take away any incentive to move quickly to plan for growth and development and slows down the much needed Washington St. planning initiative. Having diverse sets of opinions is fair, but not changing at all is not an option. She urged the Committee to vote against these measures. Keeping them in Committee could have a chilling effect on the ability to think proactively about the future.

Jane Franz, 12 Glastonbury Oval said she urged the Committee to maintain the MU4 district. Removing an entire district to address a concern occurring at a specific moment in time is the wrong reason to abandon any policy or ordinance that may adversely affect the city in the years to come. Making such a drastic action is like throwing out the baby with the bathwater. She urges the City Council, Mayor and School Committee to address the specific concerns of those whose daily lives will be affected by various developments, as has been standard practice in the past. This will provide the city with the flexibility to address changes in demographics, transportation, commercial interests, etc, Removing this district will tie the hands of future City Councils for years to come. Years ago, there were small businesses in Newtonville and they do not exist now. Internet access in a coffee shop was not on the radar 20 years ago. Ten years ago, no one was concerned about where the generation of aging baby boomers would live. With this in mind, she urged the Council to resolve the development issues in a way that does not jeopardize progress and the possibility of changes that are in the city's best interest.

Andrea Steenstrup, 21 Kimmel Terrace said if there was interest in freezing time, we could go back to when there was no Mass Pike and Newtonville was not split in two and there was a beautiful train station. That is not an option – we need to look forward, not backwards and progress with the world. Instead of fighting development, let's plan for it and let's be active and help shape it. Why fight to hold onto some vacant car dealers and other dilapidated one-story businesses. We have more opportunity to put more affordable and market rate housing near transportation, where it needs to be. If train ridership increases significantly, the train schedule could improve. If we work with developers we could work for a goal for a new train station. Look what happened with Boston Landing. That would improve life for Newtonville businesses and residents. This is the kind of forward-thinking we need to survive in this economy. Putting a moratorium on development to keep things as they are forever is stagnating and not the Newton she wants to live in. Newtonville and Washington Street are in her backyard and she wants to see deliberate, sensible planning. One co-docketer of the amendment has declared repeatedly that they do not meet with developers. How can you plan for the future without a seat at the table. She asked the Committee to vote against these items and make Newton a better place to live and let's not go backwards.

Sue Flicop, 145 Florence Street said she is speaking on her own behalf and not on behalf of the League of Women Voters. When she hears the words moratorium or ban she is concerned because they could lead to unintended consequences. A moratorium would really need to be thought through and it may not be necessary if it is directed at just two developments. She did not feel this was a good way to develop policy. The new Mayor is starting a process to work with a collaborative of people to develop a plan. That is the way to move the planning process forward. Constantly having a yes group and a no group and trying to get more numbers for each, is not a good effective discussion. She feels the best way to go forward is to let the Mayoral process continue and to reject these docket items.

Tamara Bliss, 9 Lewis Street, comments attached.

Bryan Barash, 161 Lowell Ave is opposed to these proposals. They feel like a blunt instrument to address zoning when what is needed is fine tuning. If we want the City to develop the way we can it to and assure resident buy-in, we should support the Mayor's Washington Street Visioning process and a robust community conversation around zoning reform. We do not need a blanket moratorium or to remove zoning classifications that are working, at least in some places. More affordable housing is needed. He has moved friends from the City who can't afford to live in Newton anymore. He would like to move forward as a community to decide how the City is shaped, together.

Jerry Reilly, 12 Spring Street said he is alarmed by what the amendments represent for the process. As he understands the history, it goes back 10 years when the MU4 zone was created with a nearly unanimous vote of the City Council and much work prior to that. The Orr Block project received a special permit from the City Council as well. That project was approved and all the other projects in the works on Washington Street perhaps should not be rushed into, however, the Council needs

to give explicit approval for those to move forward so there is control. As far as he can see, this is not about those projects, but it is to stop the projects that have already been approved and if that is the case it is a horrible way to move through this process.

Linda Brennan, 28 Orchard Avenue said she has lived in Newton for 43 years and she thanked everyone who participated in the Accessory apartment ordinance. She urged everyone to keep moving forward. This City cannot not stop and standstill in time. She teaches at Lesley University with young adults with severe disabilities. She deals with teachers and professors who can no longer live in Newton as well as nurses, doctors, firemen, police and families with handicapped children. This project will not meet all of our needs but it will meet some. The community needs to come together ethically and not have developers come in here and spend money to then come to a standstill. We are hurting ourselves by this behavior. Offering city and state workers should be able to live here. New construction offers environmentally friendly homes. It does not use lead paint or pipes, asbestos, and is energy efficient. This is a liberal and concerned community and we have people who need places to live. Thirty to fifty years ago we had teachers, nurses, doctors, professors living on the same street and that is no longer the case. We cannot turn our backs on people because at one point in our lives, someone helped us.

John Pelletier, 9 Central Ave said he lives a block off Washington Street and he and his wife have rented in Newtonville for the past 6 years. He is opposed to all three proposals. Limiting residential in business districts is crazy because we need people in the villages to shop at the businesses. The concerns in traffic are real. He bikes everywhere but for many people it is a major concern. Having housing in village centers is important since transportation has moved to the top greenhouse gas emission for the state of Massachusetts. Why would the City want to limit a tool in its toolbox by eliminating MU4. It was designed for very specific reasons and is not everywhere in the City. It is appropriate at the Newtonville site, but many not be appropriate elsewhere but it is built to be flexible. He can appreciate the idea of the moratorium but the existing special permit process and other reviews are more than enough control. There was vigorous debate on these projects and the same will happen with projects coming forward.

Rob Gifford, 41 Oxford Road, comments attached.

Marian Knapp, 250 Hammond Pond Parkway said she was strongly opposed to the proposed amendments. She emphasized that imposing a moratorium is that is slows down the process to provide housing for those who desperately need it. The City is down thousands of units that are needed for those who want to downsize as they reach their 60s. Delaying the process only makes this worse.

Jed, 83 Pembroke Street. This zoning proposal is just the kind of thing that we in the public and the Council has railed against for years because it is ill conceived, it is not based on any data and it is a knee jerk reaction to specific projects. It goes against the comprehensive plan; it goes against the ....zoning, both of which have been well thought out, planned, vetted, discussed, amended and voted on by the Council. We need to stop doing this. We need to base our decisions on the



planning that has gone before. We have mechanisms in place in order look at these projects individually, and revise them as we want. I urge the Council not to vote for these amendments.

Lynne Weisberg, 5 Alden Street. urged votes against these three Board Orders. First, moratoriums for this sort of thing are not good planning techniques. Every single project has to get approved by the City Council. In those six years there have been two projects that have gotten that designation. That is not rushing things through without adequate consideration. You all know how long it took for Austin Street to finally be approved; over seven years. Likewise Washington Place was not passed in a flash of a moment. There is a planning process that has been called, "Hello Washington Street" that will look at what is sensible planning in advance for the Washington Street corridor. To the extent that people have said that what is planned by the developer who owns a lot of property on Washington Street is that every single parcel would be a tall building. Some have referred to them as sky scrapers. That is not what he is planning and even if it were just because he would seek your approval doesn't mean that you have to give it. These are ill conceived ideas and should be voted down tonight.

Marcia Cooper, 170 Evelyn Road. Green Newton is an environmental group and we understand how closely Land Use and Development are intertwined with environmental issues. That is why we support the concept of smart growth which encourages more development and Newton's walkable village centers which are served by public transportation. Environmental quality is profoundly affected by the way cities are developed. Our new development is located near public transportation, village centers, resident's needs are easily met by walking to shops, restaurants, and public transportation. It is more likely to be utilized for community and walking to school and those kinds of things. Other important environmental improvements like relying on renewable energy are generally much easier to achieve when building denser housing and mixed use housing. When you think of solar and green power, the years it has taken to put wind power along the Massachusetts coast, you don't want to keep delaying six years to approve Austin Street and Washington Street.

Stephanie said having MU4 as a possible designation does not mean any development can set up an MU4. I have to believe the Councilors and Committees have the interest of Newton at heart and do the calculation. One of the purposes of MU4 is to make it possible for retail stores to have customers because by having people living near the stores they are able to buy from the stores and with that basic purpose in mind. It is very important to have more commercial development, but we cannot just do that without people who would be customers in the area. She did not know why people think that will disrupt the balance and we have to pay for schools without people getting taxes from the commercial area to pay for the schools. I am opposed to putting in the moratorium. I think we should rely on the Planning Committees. I do want to see more data. You can't set up a transit if no one is living there.

**#268-18****Submission of the FY19 Annual Action Plan to HUD**

HER HONOR THE MAYOR requesting City Council authorization to submit the FY19 Annual Action Plan to the U.S. Department of Housing and Urban Development

(HUD) for the City of Newton Community Development Block Grant (CDBG), Emergency Solution Grant (ESG) funds and the WestMetro HOME Consortium.

**Action: Zoning & Planning Approved 6-0 (Baker not voting)**

**Note:** Rachel Powers, Community Development Programs Manager joined the Committee. This item was last discussed at the May 14<sup>th</sup> Committee meeting and there had been some confusion over the City's housing goals in the Annual Action Plan that was to be submitted to the Department of Housing and Urban Development (HUD). Ms. Powers explained that there are currently no identified housing projects. Some projects were referred to in the Action Plan that are being initiated by the City, but money has been allocated for those projects. Changes were made to the draft for clarification and a redline version was included in the Planning Memo that was attached the agenda. Those changes may be found at:

<http://www.newtonma.gov/civicax/filebank/documents/90015/05-29-18%20Planning%20Memo%20#268-18.pdf>

The Committee thanked Ms. Powers for the edits, remarking that they were done thoughtfully and well.

Councilor Danberg moved approval and the Committee voted in favor unanimously.

**#299-18 Appointment of Kelley Brown to the Planning & Development Board**

HER HONOR THE MAYOR appointing KELLEY BROWN, 457 Waltham Street, West Newton, as a full member of the PLANNING & DEVELOPMENT BOARD for a term to expire February 1, 2019.

**Action: Zoning & Planning Approved 5-0-1 (Kalis abstaining; Baker not voting)**

**Note:** Kelley Brown joined the Committee. He explained that he has lived in Newton for 19 years and has not been engaged in the community as a volunteer since his children were in school. He has worked in planning his entire professional life and felt his experience could be helpful. Mr. Kelley is an institutional planner and works on behalf of MIT to help move their projects forward. He is also involved in transportation and open space planning around the campus. He felt the Planning & Development Board would be a great fit.

A Councilor asked about the Dudley Square project Mr. Kelley had worked on in Boston. He said it rose from community organizing and it centered on a very de-populated area of the city with many demolished buildings. The community worked against further ruination of the area that had come about through the dumping of construction debris, etc. in lots in the neighborhood. They decided they needed a community plan instead of fighting each fight separately. The Boston Redevelopment Authority gave the community group eminent domain authority. He also assisted through applying and receiving a grant and helping them best utilize their CDBG funds.

Councilor Brousal-Glaser moved approval. Councilor Kalis explained that he would be abstaining because there are going to be more appointments to the Board and wants to better understand

**Application for Federal Assistance SF-424**

\* 1. Type of Submission:

- Preapplication  
 Application  
 Changed/Corrected Application

\* 2. Type of Application:

- New  
 Continuation  
 Revision

\* If Revision, select appropriate letter(s):

\* Other (Specify):

\* 3. Date Received:

4. Applicant Identifier:

B-18-MC-25-0019

5a. Federal Entity Identifier:

UPG Code: MA251650 NEWTON

5b. Federal Award Identifier:

B-18-MC-25-0019

**State Use Only:**

6. Date Received by State:

7. State Application Identifier:

**8. APPLICANT INFORMATION:**

\* a. Legal Name:

City of Newton

\* b. Employer/Taxpayer Identification Number (EIN/TIN):

46-001404

\* c. Organizational DUNS:

0765768260000

**d. Address:**

\* Street1:

1000 Commonwealth Avenue

Street2:

\* City:

Newton

County/Parish:

Middlesex

\* State:

MA: Massachusetts

Province:

\* Country:

USA: UNITED STATES

\* Zip / Postal Code:

02459-1149

**e. Organizational Unit:**

Department Name:

Planning and Development

Division Name:

Housing/Community Development

**f. Name and contact information of person to be contacted on matters involving this application:**

Prefix:

Ms.

\* First Name:

Rachel

Middle Name:

\* Last Name:

Powers

Suffix:

Title: Community Development Programs Manager

Organizational Affiliation:

City of Newton

\* Telephone Number:

617-796-1125

Fax Number:

\* Email: rpowers@newtonma.gov

**Application for Federal Assistance SF-424**

**\* 9. Type of Applicant 1: Select Applicant Type:**

C: City or Township Government

**Type of Applicant 2: Select Applicant Type:**

X: Other (specify)

**Type of Applicant 3: Select Applicant Type:**

**\* Other (specify):**

WestMetro HOME Cons; BoS CoC

**\* 10. Name of Federal Agency:**

U.S. Department of Housing and Urban Development

**11. Catalog of Federal Domestic Assistance Number:**

14.218

**CFDA Title:**

CDBG/Entitlement Grant Program

**\* 12. Funding Opportunity Number:**

B-18-MC-25-0019

**\* Title:**

City of Newton CDBG Program

**13. Competition Identification Number:**

**Title:**

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

Form SF 424 Attachment - Question 14.docx

Add Attachment

Delete Attachment

View Attachment

**\* 15. Descriptive Title of Applicant's Project:**

City of Newton CDBG Program

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

**Application for Federal Assistance SF-424**

**16. Congressional Districts Of:**

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

**17. Proposed Project:**

\* a. Start Date:

\* b. End Date:

**18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="1,918,213.00"/>
* b. Applicant	<input type="text"/>
* c. State	<input type="text"/>
* d. Local	<input type="text"/>
* e. Other	<input type="text"/>
* f. Program Income	<input type="text" value="125,000.00"/>
* g. TOTAL	<input type="text" value="2,043,213.00"/>

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

a. This application was made available to the State under the Executive Order 12372 Process for review on

b. Program is subject to E.O. 12372 but has not been selected by the State for review.

c. Program is not covered by E.O. 12372.

**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

Yes  No

If "Yes", provide explanation and attach

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

\*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**

Prefix:  \* First Name:

Middle Name:


\* Last Name:

Suffix:

\* Title:

\* Telephone Number:  Fax Number:

\* Email:

\* Signature of Authorized Representative: 

\* Date Signed:

Form SF 424  
City of Newton

**14. Areas Affected by Project – Attachment**

CDBG Program: City of Newton

WestMetro HOME Consortium: Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Newton, Sudbury, Waltham, Watertown, and Wayland

Continuum of Care and/or ESG: Brookline, Newton, Waltham, Watertown

Form SF 424  
City of Newton

**16. Congressional Districts of Program/Project – Attachment**  
MA-003; MA-004; MA-005; MA-006

Application for Federal Assistance SF-424		
<b>* 1. Type of Submission:</b> <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	<b>* 2. Type of Application:</b> <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision	<b>* If Revision, select appropriate letter(s):</b> <input type="text"/> <b>* Other (Specify):</b> <input type="text"/>
<b>* 3. Date Received:</b> <input type="text"/>	<b>4. Applicant Identifier:</b> M18-DC25-0213	
<b>5a. Federal Entity Identifier:</b> UPG Code: MA251650 NEWTON	<b>5b. Federal Award Identifier:</b> M18-DC25-0213	
<b>State Use Only:</b>		
<b>6. Date Received by State:</b> <input type="text"/>	<b>7. State Application Identifier:</b> <input type="text"/>	
<b>8. APPLICANT INFORMATION:</b>		
<b>* a. Legal Name:</b> City of Newton		
<b>* b. Employer/Taxpayer Identification Number (EIN/TIN):</b> 46-001404	<b>* c. Organizational DUNS:</b> 0765768260000	
<b>d. Address:</b>		
<b>* Street1:</b> 1000 Commonwealth Avenue	<input type="text"/>	
<b>Street2:</b>	<input type="text"/>	
<b>* City:</b> Newton	<input type="text"/>	
<b>County/Parish:</b> Middlesex	<input type="text"/>	
<b>* State:</b> MA: Massachusetts	<input type="text"/>	
<b>Province:</b>	<input type="text"/>	
<b>* Country:</b> USA: UNITED STATES	<input type="text"/>	
<b>* Zip / Postal Code:</b> 02459-1149	<input type="text"/>	
<b>e. Organizational Unit:</b>		
<b>Department Name:</b> Planning and Development	<b>Division Name:</b> Housing/Community Development	
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>		
<b>Prefix:</b> Ms.	<b>* First Name:</b> Rachel	
<b>Middle Name:</b>	<input type="text"/>	
<b>* Last Name:</b> Powers	<input type="text"/>	
<b>Suffix:</b>	<input type="text"/>	
<b>Title:</b> Community Development Programs Manager		
<b>Organizational Affiliation:</b> City of Newton		
<b>* Telephone Number:</b> 617-796-1125	<b>Fax Number:</b> <input type="text"/>	
<b>* Email:</b> rpowers@newtonma.gov		



**Application for Federal Assistance SF-424**

**\* 9. Type of Applicant 1: Select Applicant Type:**

C: City or Township Government

Type of Applicant 2: Select Applicant Type:

X: Other (specify)

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

WestMetro HOME Cons; BoS CoC

**\* 10. Name of Federal Agency:**

U.S. Department of Housing and Urban Development

**11. Catalog of Federal Domestic Assistance Number:**

14.239

CFDA Title:

HOME Investment Partnerships Program

**\* 12. Funding Opportunity Number:**

M18-DC25-0213

\* Title:

WestMetro HOME Consortium

**13. Competition Identification Number:**

Title:

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

Form SF 424 Attachment - Question 14.docx

Add Attachment

Delete Attachment

View Attachment

**\* 15. Descriptive Title of Applicant's Project:**

City of Newton ESG Program

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

**Application for Federal Assistance SF-424**

**16. Congressional Districts Of:**

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

**17. Proposed Project:**

\* a. Start Date:

\* b. End Date:

**18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="1,597,353.00"/>
* b. Applicant	<input type="text"/>
* c. State	<input type="text"/>
* d. Local	<input type="text"/>
* e. Other	<input type="text"/>
* f. Program Income	<input type="text" value="509,780.55"/>
* g. TOTAL	<input type="text" value="2,107,133.55"/>

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

a. This application was made available to the State under the Executive Order 12372 Process for review on

b. Program is subject to E.O. 12372 but has not been selected by the State for review.

c. Program is not covered by E.O. 12372.

**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

Yes  No

If "Yes", provide explanation and attach

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

\*\* I AGREE

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**Authorized Representative:**

Prefix:  \* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Title:

\* Telephone Number:  Fax Number:

\* Email:

\* Signature of Authorized Representative: 

\* Date Signed:

Form SF 424  
City of Newton

**14. Areas Affected by Project – Attachment**

CDBG Program: City of Newton

WestMetro HOME Consortium: Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Newton, Sudbury, Waltham, Watertown, and Wayland

Continuum of Care and/or ESG: Brookline, Newton, Waltham, Watertown

Form SF 424  
City of Newton

**16. Congressional Districts of Program/Project – Attachment**  
MA-003; MA-004; MA-005; MA-006

**Application for Federal Assistance SF-424**

**\* 1. Type of Submission:**

- Preapplication
- Application
- Changed/Corrected Application

**\* 2. Type of Application:**

- New
- Continuation
- Revision

**\* If Revision, select appropriate letter(s):**

**\* Other (Specify):**

**\* 3. Date Received:**

**4. Applicant Identifier:**

E18-MC-25-0010

**5a. Federal Entity Identifier:**

UPG Code: MA251650 NEWTON

**5b. Federal Award Identifier:**

E18-MC-25-0010

**State Use Only:**

**6. Date Received by State:**

**7. State Application Identifier:**

**8. APPLICANT INFORMATION:**

**\* a. Legal Name:**

City of Newton

**\* b. Employer/Taxpayer Identification Number (EIN/TIN):**

46-001404

**\* c. Organizational DUNS:**

0765768260000

**d. Address:**

**\* Street1:**

1000 Commonwealth Avenue

**Street2:**

**\* City:**

Newton

**County/Parish:**

Middlesex

**\* State:**

MA: Massachusetts

**Province:**

**\* Country:**

USA: UNITED STATES

**\* Zip / Postal Code:**

02459-1149

**e. Organizational Unit:**

**Department Name:**

Planning and Development

**Division Name:**

Housing/Community Development

**f. Name and contact information of person to be contacted on matters involving this application:**

**Prefix:**

Ms.

**\* First Name:**

Rachel

**Middle Name:**

**\* Last Name:**

Powers

**Suffix:**

**Title:**

Community Development Programs Manager

**Organizational Affiliation:**

City of Newton

**\* Telephone Number:**

617-796-1125

**Fax Number:**

**\* Email:**

rpowers@newtonma.gov

**Application for Federal Assistance SF-424**

**\* 9. Type of Applicant 1: Select Applicant Type:**

C: City or Township Government

**Type of Applicant 2: Select Applicant Type:**

X: Other (specify)

**Type of Applicant 3: Select Applicant Type:**

**\* Other (specify):**

WestMetro HOME Cons; BoS CoC

**\* 10. Name of Federal Agency:**

U.S. Department of Housing and Urban Development

**11. Catalog of Federal Domestic Assistance Number:**

14.231

**CFDA Title:**

ESG Program (14.231)

**\* 12. Funding Opportunity Number:**

E18-MC-25-0010

**\* Title:**

City of Newton ESG Program

**13. Competition Identification Number:**

**Title:**

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

Form SF 424 Attachment - Question 14.docx

Add Attachment

Delete Attachment

View Attachment

**\* 15. Descriptive Title of Applicant's Project:**

City of Newton ESG Program

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

**Application for Federal Assistance SF-424**

**16. Congressional Districts Of:**

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

**17. Proposed Project:**

\* a. Start Date:

\* b. End Date:

**18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="156,262.00"/>
* b. Applicant	<input type="text"/>
* c. State	<input type="text"/>
* d. Local	<input type="text"/>
* e. Other	<input type="text"/>
* f. Program Income	<input type="text"/>
* g. TOTAL	<input type="text" value="156,262.00"/>

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**Authorized Representative:**

Prefix:  \* First Name:

Middle Name:

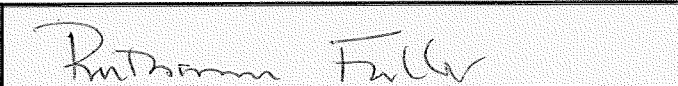
\* Last Name:

Suffix:

\* Title:

\* Telephone Number:  Fax Number:

\* Email:

\* Signature of Authorized Representative: 

\* Date Signed:

Form SF 424  
City of Newton

**14. Areas Affected by Project – Attachment**

CDBG Program: City of Newton

WestMetro HOME Consortium: Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Newton, Sudbury, Waltham, Watertown, and Wayland

Continuum of Care and/or ESG: Brookline, Newton, Waltham, Watertown



Form SF 424  
City of Newton

**16. Congressional Districts of Program/Project – Attachment**  
MA-003; MA-004; MA-005; MA-006

**CERTIFICATIONS**

In accordance with the applicable statutes and the regulations governing the consolidated plan regulations, the jurisdiction certifies that:

**Affirmatively Further Fair Housing** --The jurisdiction will affirmatively further fair housing.

**Uniform Relocation Act and Anti-displacement and Relocation Plan** -- It will comply with the acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, (42 U.S.C. 4601-4655) and implementing regulations at 49 CFR Part 24. It has in effect and is following a residential anti-displacement and relocation assistance plan required under 24 CFR Part 42 in connection with any activity assisted with funding under the Community Development Block Grant or HOME programs.

**Anti-Lobbying** --To the best of the jurisdiction's knowledge and belief:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of it, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement;
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

**Authority of Jurisdiction** --The consolidated plan is authorized under State and local law (as applicable) and the jurisdiction possesses the legal authority to carry out the programs for which it is seeking funding, in accordance with applicable HUD regulations.

**Consistency with plan** --The housing activities to be undertaken with Community Development Block Grant, HOME, Emergency Solutions Grant, and Housing Opportunities for Persons With AIDS funds are consistent with the strategic plan in the jurisdiction's consolidated plan.

**Section 3** -- It will comply with section 3 of the Housing and Urban Development Act of 1968 (12 U.S.C. 1701u) and implementing regulations at 24 CFR Part 135.

Ruthanne Fuller  
Signature of Authorized Official

6/11/18  
Date

Mayor  
Title

## Specific Community Development Block Grant Certifications

The Entitlement Community certifies that:

**Citizen Participation** -- It is in full compliance and following a detailed citizen participation plan that satisfies the requirements of 24 CFR 91.105.

**Community Development Plan** -- Its consolidated plan identifies community development and housing needs and specifies both short-term and long-term community development objectives that have been developed in accordance with the primary objective of the CDBG program (i.e., the development of viable urban communities, by providing decent housing and expanding economic opportunities, primarily for persons of low and moderate income) and requirements of 24 CFR Parts 91 and 570.

**Following a Plan** -- It is following a current consolidated plan that has been approved by HUD.

**Use of Funds** -- It has complied with the following criteria:

1. Maximum Feasible Priority. With respect to activities expected to be assisted with CDBG funds, it has developed its Action Plan so as to give maximum feasible priority to activities which benefit low- and moderate-income families or aid in the prevention or elimination of slums or blight. The Action Plan may also include CDBG-assisted activities which the grantee certifies are designed to meet other community development needs having particular urgency because existing conditions pose a serious and immediate threat to the health or welfare of the community, and other financial resources are not available (see Optional CDBG Certification).

2. Overall Benefit. The aggregate use of CDBG funds, including Section 108 guaranteed loans, during program year(s) 2018 [a period specified by the grantee of one, two, or three specific consecutive program years], shall principally benefit persons of low and moderate income in a manner that ensures that at least 70 percent of the amount is expended for activities that benefit such persons during the designated period.

3. Special Assessments. It will not attempt to recover any capital costs of public improvements assisted with CDBG funds, including Section 108 loan guaranteed funds, by assessing any amount against properties owned and occupied by persons of low and moderate income, including any fee charged or assessment made as a condition of obtaining access to such public improvements.

However, if CDBG funds are used to pay the proportion of a fee or assessment that relates to the capital costs of public improvements (assisted in part with CDBG funds) financed from other revenue sources, an assessment or charge may be made against the property with respect to the public improvements financed by a source other than CDBG funds.

In addition, in the case of properties owned and occupied by moderate-income (not low-income) families, an assessment or charge may be made against the property for public improvements financed by a source other than CDBG funds if the jurisdiction certifies that it lacks CDBG funds to cover the assessment.

**Excessive Force** -- It has adopted and is enforcing:

1. A policy prohibiting the use of excessive force by law enforcement agencies within its jurisdiction against any individuals engaged in non-violent civil rights demonstrations; and
2. A policy of enforcing applicable State and local laws against physically barring entrance to or exit from a facility or location which is the subject of such non-violent civil rights demonstrations within its jurisdiction.

**Compliance with Anti-discrimination laws** -- The grant will be conducted and administered in conformity with title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d) and the Fair Housing Act (42 U.S.C. 3601-3619) and implementing regulations.

**Lead-Based Paint** -- Its activities concerning lead-based paint will comply with the requirements of 24 CFR Part 35, Subparts A, B, J, K and R.

**Compliance with Laws** -- It will comply with applicable laws.

Ruthann Fuller  
Signature of Authorized Official

6/11/18  
Date

Mayor  
Title

**OPTIONAL Community Development Block Grant Certification**

Submit the following certification only when one or more of the activities in the action plan are designed to meet other community development needs having particular urgency as specified in 24 CFR 570.208(c):

The grantee hereby certifies that the Annual Plan includes one or more specifically identified CDBG-assisted activities which are designed to meet other community development needs having particular urgency because existing conditions pose a serious and immediate threat to the health or welfare of the community and other financial resources are not available to meet such needs.

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

**Specific HOME Certifications**

The HOME participating jurisdiction certifies that:

**Tenant Based Rental Assistance** -- If it plans to provide tenant-based rental assistance, the tenant-based rental assistance is an essential element of its consolidated plan.

**Eligible Activities and Costs** -- It is using and will use HOME funds for eligible activities and costs, as described in 24 CFR §§92.205 through 92.209 and that it is not using and will not use HOME funds for prohibited activities, as described in §92.214.

**Subsidy layering** -- Before committing any funds to a project, it will evaluate the project in accordance with the guidelines that it adopts for this purpose and will not invest any more HOME funds in combination with other Federal assistance than is necessary to provide affordable housing;

Ruthann Fuller  
Signature of Authorized Official

6/11/18  
Date

Mayor  
Title

## **Emergency Solutions Grants Certifications**

The Emergency Solutions Grants Program recipient certifies that:

**Major rehabilitation/conversion/renovation** – If an emergency shelter’s rehabilitation costs exceed 75 percent of the value of the building before rehabilitation, the recipient will maintain the building as a shelter for homeless individuals and families for a minimum of 10 years after the date the building is first occupied by a homeless individual or family after the completed rehabilitation.

If the cost to convert a building into an emergency shelter exceeds 75 percent of the value of the building after conversion, the recipient will maintain the building as a shelter for homeless individuals and families for a minimum of 10 years after the date the building is first occupied by a homeless individual or family after the completed conversion.

In all other cases where ESG funds are used for renovation, the recipient will maintain the building as a shelter for homeless individuals and families for a minimum of 3 years after the date the building is first occupied by a homeless individual or family after the completed renovation.

**Essential Services and Operating Costs** – In the case of assistance involving shelter operations or essential services related to street outreach or emergency shelter, the recipient will provide services or shelter to homeless individuals and families for the period during which the ESG assistance is provided, without regard to a particular site or structure, so long the recipient serves the same type of persons (e.g., families with children, unaccompanied youth, disabled individuals, or victims of domestic violence) or persons in the same geographic area.

**Renovation** – Any renovation carried out with ESG assistance shall be sufficient to ensure that the building involved is safe and sanitary.

**Supportive Services** – The recipient will assist homeless individuals in obtaining permanent housing, appropriate supportive services (including medical and mental health treatment, victim services, counseling, supervision, and other services essential for achieving independent living), and other Federal, State, local, and private assistance available for these individuals.

**Matching Funds** – The recipient will obtain matching amounts required under 24 CFR 576.201.

**Confidentiality** – The recipient has established and is implementing procedures to ensure the confidentiality of records pertaining to any individual provided family violence prevention or treatment services under any project assisted under the ESG program, including protection against the release of the address or location of any family violence shelter project, except with the written authorization of the person responsible for the operation of that shelter.

**Homeless Persons Involvement** – To the maximum extent practicable, the recipient will involve, through employment, volunteer services, or otherwise, homeless individuals and families in constructing, renovating, maintaining, and operating facilities assisted under the ESG program, in providing services assisted under the ESG program, and in providing services for occupants of facilities assisted under the program.

**Consolidated Plan** – All activities the recipient undertakes with assistance under ESG are consistent with its consolidated plan.

**Discharge Policy** – The recipient will establish and implement, to the maximum extent practicable and where appropriate, policies and protocols for the discharge of persons from publicly funded institutions or systems of care (such as health care facilities, mental health facilities, foster care or other youth facilities, or correction programs and institutions) in order to prevent this discharge from immediately resulting in homelessness for these persons.

Ruthanne Fuller  
Signature of Authorized Official

6/11/18  
Date

Mayor  
Title



## Housing Opportunities for Persons With AIDS Certifications

The HOPWA grantee certifies that:

**Activities** -- Activities funded under the program will meet urgent needs that are not being met by available public and private sources.

**Building** -- Any building or structure assisted under that program shall be operated for the purpose specified in the consolidated plan:

1. For a period of not less than 10 years in the case of assistance involving new construction, substantial rehabilitation, or acquisition of a facility,
2. For a period of not less than 3 years in the case of assistance involving non-substantial rehabilitation or repair of a building or structure.

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

## APPENDIX TO CERTIFICATIONS

### INSTRUCTIONS CONCERNING LOBBYING CERTIFICATION:

#### **Lobbying Certification**

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.