

CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT

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

JULY 1, 2014 – JUNE 30, 2015



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September 30, 2015

Mr. Robert D. Shumeyko, Director
Office of Community Planning and Development
Thomas P. O'Neill, Jr. Federal Building
10 Causeway Street
Boston, MA 02222-1092

RE: FY15 (FFY14) Consolidated Annual Performance and Evaluation Report

Dear Mr. Shumeyko:

I am pleased to submit two copies of the Consolidated Annual Performance and Evaluation Report (July 1, 2014 to June 30, 2015) of the FY11-15 Consolidated Plan for the City of Newton and the WestMetro HOME Consortium.

If you have any questions concerning the report, please contact me at (617) 796-1125 or jmenon@newtonma.gov.

Sincerely,

Judith Menon
Community Development Programs Manager

Cc: Cedric Kam, CPD Representative

Enclosures

2015 SEP 30 P 1:59

Table of Contents

Executive Summary

Part I. City of Newton

Assessment of Goals and Objective

Housing.....	3
Public Services	13
Architectural Access	18
Economic Development	21
Neighborhood Improvements.....	23
ESG and Continuum of Care	27
Citizen Participation	33

Part II. WestMetro HOME Consortium Program

Assessment of Goals and Objectives

Bedford	34
Belmont	37
Brookline.....	42
Concord	52
Framingham.....	56
Lexington	61
Natick	65
Needham	71
Sudbury.....	82
Waltham	85
Watertown	95
Wayland.....	101

Part III. Appendix

Comments	104
Financial Summary	105
HOME Match Report	114
HOME Annual Performance Report	116
Emergency Solutions Grant Documentation.....	118
Certification Forms	126

Executive Summary

The *FY15 Consolidated Annual Performance and Evaluation Report* (CAPER) provides an analysis of the fifth year of the FY11-15 Consolidated Plan—July 1, 2014 through June 30, 2015—for the City of Newton Community Development Block Grant program (CDBG), Emergency Solutions Grant (ESG) program, the WestMetro HOME Consortium HOME Investment Partnerships program (HOME), and the American Dream Downpayment Initiative program (ADDI). These funds provided the City of Newton and 12 other communities in the WestMetro HOME Consortium with a total of \$3,372,610 in FY15 resources from HUD.

The five-year *Consolidated Plan* was developed to describe the use of these federal resources for housing and community development activities in Newton and housing activities in 12 other HOME Consortium communities (the towns of Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Sudbury, Watertown, and Wayland and the City of Waltham). The *FY15 Action Plan* provided details to citizens, public and private agencies, and other interested parties on the program activities that were planned in response to the priority needs identified in the Consolidated Plan. The CAPER provides an assessment of how successful Newton and the Consortium communities were at meeting their goals.

The following table summarizes the amount of FY15 funds that were received and, along with prior year funding, expended, which are described in more detail below.

Program	Funds Received	Funds Expended
CDBG	\$1,789,510	\$1,407,022.48
HOME – Newton	\$146,267	\$19,291.50
HOME – Consortium	\$1,093,631	\$2,211,247.98
Emergency Solutions Grant	\$143,202	\$150,891.56

Significant progress was made by the Newton Housing and Community Development Program in meeting the goals and objectives of the FY11-15 Consolidated Plan and the FY15 Annual Action Plan. In FY15, the City of Newton received \$1,789,510 in CDBG funds and expended \$1,407,022.48 in FY15 and prior year funds.

Relative to housing development and housing rehabilitation activities, work continued on implementing policies to increase the number of affordable housing units and to rehabilitate those homes in need throughout the City. Human services projects continued to reach low- and moderate-income residents with their valuable programs. Neighborhood improvement and accessibility projects

made visible changes to the areas of greatest need in Newton and helped residents gain access to both public and private facilities.

During FY15, \$1,239,898 in HOME funding was allocated to the WestMetro HOME Consortium, with \$19,291.50 expended in Newton, and \$2,211,247.98 expended throughout the Consortium in both prior and current year funds. The Consortium member communities laid the groundwork for many pending HOME-assisted affordable housing development projects.

In FY15, the City of Newton received \$143,202 in ESG funding and expended \$150,891.26 in current and prior year funds. Seven ESG projects and one CDBG-funded activity provided assistance to 639 people who were either homeless or at-risk of homelessness. The types of assistance ranged from transitional housing for survivors of domestic violence, to crisis management for adolescents at risk of homelessness, to mediation services for low-income tenants and their landlords to reach mutually beneficial agreements, thus preventing eviction and possible homelessness. One additional project received ESG funding for shelter renovations.

The City of Newton Housing and Community Development Program and the WestMetro HOME Consortium had much success in the fifth year of the *FY11–15 Consolidated Plan*. The following pages provide detailed descriptions of the accomplishments in each member community.

PART I
CITY OF NEWTON

**FY15 CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT
ASSESSMENT OF GOALS AND OBJECTIVES
CITY OF NEWTON**

HOUSING

In the *FY11-15 Consolidated Plan*, the City identified three priority housing needs which are listed below. In FY15, City housing staff and members of two advisory bodies—the Newton Housing Partnership and the Fair Housing Committee—continued to work collaboratively to address these ongoing priorities.

The major activities in FY15, which contribute to addressing Newton’s priorities, include the following:

In June 2015, the City of Newton’s Planning and Development Department embarked on a 9-month process to develop a City-Wide Housing Strategy. The strategy will identify approaches and actions that will enable the City to reach its goal of achieving 10% of Newton’s housing stock affordable to low- and moderate-income households by 2021. It is the City’s expectation that the strategy will identify desirable locations for affordable housing and potentially target funding to these locations.

A Tenant Based Rental Assistance Program (TBRA) to provide rental assistance and supportive services to eligible low and moderate income households living in hotels/motels was initiated in FY15. It is estimated that the program will assist two or three households with income between 30% AMI and 50% AMI for up to two consecutive years. In FY15 eight households were prequalified. It is anticipated that the households will be selected through a lottery process and assistance will start in FY16.

In FY15, the City approved \$360,000 in CDBG funds and \$125,000 in HOME Program funds for the acquisition and rehabilitation of a single family home located at 54 Taft Avenue in West Newton. The project sponsored by Citizens for Affordable Housing in Newton Development Organization, Inc. (CAN-DO) will expand the small, existing single-family home to create two units of permanently affordable rental housing: a 3-bedroom unit affordable to households at 80% of area median income, and a 2-bedroom unit affordable to households at 50% of area median income. In FY15, the City closed on the loans to provide \$604,679 in CDBG funds and \$339,000 in HOME Program funds for the redevelopment of two existing homes at 12 and 18-20 Curve Street, known as Myrtle Village, into 7 permanently affordable rental units. Two units will be affordable to households earning less than 50% AMI, 2 units for households earning less than 70% of AMI, and 3 units for households at less than 85% of AMI. The Myrtle Village project is anticipated to start construction of Phase I in FY16. In FY15, \$75,434.58 was expended on housing development projects.

The CDBG-funded Newton Housing Rehabilitation Program expended \$355,474.53 on twelve new and ongoing projects. Additionally, \$565,567 in Community Development Block Grant (CDBG) funds have been committed for the selective rehabilitation of a 124-unit elderly affordable housing development. In FY15 the Newton Homebuyer Assistance Program was recapitalized with \$1,057,000 in Community Preservation Funds. The program will be begin marketing in FY16 and it is estimated that 6 income eligible, first time homebuyer families will be assisted.

In FY15 the WestMetro HOME Consortium member communities worked with a consultant to develop the 2015-2020 *WestMetro HOME Consortium Regional Fair Housing Plan and Appendices* (RFHP or Fair Housing Plan). The completion of this plan meets the obligations under the Voluntary Compliance Agreement (VCA) between the WestMetro HOME Consortium and the U.S. Department of Housing and Urban Development HUD, dated September 24, 2013.

A brief summary of the FY15 activities is included in the following paragraphs, followed by a breakdown of the CDBG and HOME funds spent during the fiscal year.

Priority need #1: Provide deeper subsidies in affordable housing projects so that very low-income renter households have a greater range of housing choices.

In FY15, Myrtle Village received approval for a comprehensive permit from the Newton Zoning Board of Appeals allowing the project to move forward. The project will utilize the \$604,679 in CDBG funds and \$339,000 in HOME Program funds, as well as Community Preservation Funds to redevelop two existing properties located at 12 and 18-20 Curve Street. The two properties are currently comprised of three units. The Sponsor, Myrtle Village, LLC will divide the structure at 12 Curve Street, which is an existing single-family house into two units, rehabilitate the property, and construct an attached third unit. The two-family building at 18-20 Curve Street will be rehabilitated and one one-story unit and one two-story unit will be constructed on either side of the existing duplex. The estimated total development cost is \$3,077,604. The total public subsidy requested is \$1,853,858 or \$264,837/unit. The project is anticipated to be completed in FY16.

The completed project will provide a total of seven units of affordable rental housing, including two HOME-assisted units for households earning up to 50% AMI, two units for households earning up to 70% AMI and three to households earning less than 85% AMI. This project exceeds the minimum CDBG and HOME affordability requirements. One unit will be fully wheelchair accessible. The other two units will meet HUD's visitability standards.

In FY15, the City approved \$360,000 in CDBG funds and \$125,000 in HOME Program funds for the acquisition and rehabilitation of a single family home located at 54 Taft Avenue in West Newton. The project sponsored by Citizens for Affordable Housing in Newton Development Organization, Inc. (CAN-DO), as CHDO, will expand the small, existing single-family home to create two units of permanently affordable rental housing: a 3-bedroom unit affordable to households at 80% of area median income, and a 2-bedroom unit affordable to households at 50% of area median income. In FY16 the Sponsor will seek zoning relief under the Massachusetts General Law Chapter 40B.

Priority need #2: Reduce financial and institutional barriers to increase the availability of affordable housing by increasing funding; expediting the local funding review and project approval processes; and providing more case management and financial education for tenants.

The 54 Taft Avenue project was conceived and underwritten so that residents do not need to have rental assistance to be able to live at the development, which required increased funding for the project. This project is an example of how housing can be made available to lower-income households.

The Newton Board of Aldermen approved the appropriation of \$1,057,000 in Community Preservation Funds to recapitalize the Newton Homebuyer Assistance Program in FY15. The Program, which was also revised to follow the Commonwealth of Massachusetts' marketing and sale price guidelines, provides grants to income-eligible first time homebuyers to purchase an existing property in Newton. In exchange, the property is deed-restricted in perpetuity enabling future income-eligible buyers to afford the unit upon resale. The program will begin marketing in FY16 and it is estimated that 6 income eligible, first time homebuyer families will be assisted.

In FY15, the City of Newton initiated the Tenant Based Rental Assistance Program (TBRA) to provide rental assistance and supportive services to eligible low and moderate income households living in hotels/motels. Following the implementation of the Affirmative Marketing Plan, over 200 Preliminary Applications were received. Eight of the applicants reported income between 30% AMI and 50% AMI qualifying them for the Program per the required income targets stipulated in the Guidelines. The eight households will be given the opportunity to complete the full application process and if determined eligible will be entered into a lottery. In FY16, the selection process will be completed and two or more households will be provided with rental assistance for a two year period, with the possibility of renewal. The City of Newton has partnered with Metropolitan Boston Housing Partnership (MBHP) to assist selected households in finding housing and to provide support services to meet the self-sufficiency requirement of a HOME-funded TBRA program. MBHP will provide up to \$8,000 in household assistance and up to one year of stabilization services, including housing assistance, job training and financial management.

Priority need #3: Institutionalize principles and practices of fair housing including:

- 1. Supporting and expanding the socio-economic, ethnic, cultural, and racial diversity in Newton;**
- 2. Improving fair housing performance and compliance regarding the City's fair housing plans and applicable policies and laws; and**
- 3. Developing an institutional infrastructure that enables the City to meet its fair housing obligations regarding monitoring and compliance.**

The City accomplished a number of activities related to meeting the priority needs identified in #3 including the following:

In FY15, The City of Newton along with the WestMetro HOME Consortium completed the 2015-2020 WestMetro HOME Consortium Regional Fair Housing Plan (RFHP or Fair Housing Plan). The document was completed to comply with the Voluntary Compliance Agreement (VCA) between the WestMetro HOME Consortium and the U.S. Department of Housing and Urban Development HUD, dated September 24, 2013. The WestMetro HOME Consortium member communities worked with the Metropolitan Area Planning Council (MAPC) to develop the RFHP. A robust public participation process was undertaken during the development of the plan including presentations to the Fair Housing Committee and the Planning and Development Board. Ultimately the Planning and Development Board approved the final draft prior to the Mayor's approval.

The overall goals of the 2015 – 2020 RFHP are: to provide an understanding of fair housing obligation and the needs of protected classes; to identify impediments to fair housing choice through an analysis of public and private sector policies and activities; and to provide a framework to public and private

sector partners that enables them to take the lead in affirmatively furthering fair housing by initiating dialogue and institutionalizing fair housing best practices and policies. Through research and analysis of the characteristics of the region, fair housing complaints reported, and public and private sector impediments to fair housing, the Fair Housing Plan proposes a five-year action plan that will sustain current efforts to further fair housing in the Consortium municipalities.

In FY15, the City continued to work on implementation of the actions identified in the Supplement to FY11-15 Analysis of Impediments to Fair Housing Choice (AI) to further equal housing opportunity. These include encouraging smart growth through a range of planning and implementation actions, engaging and providing fair housing education to interested residents, creating additional transit options, and access to economic and social opportunities by fostering the reuse of City-owned land to create more diverse and affordable housing stock.

In FY15, the City adopted the Brookings Institution's Benchmarks for Success. The Brookings Institution's Social Genome Project identified the following five benchmarks as key predictors of economic success: being born to a non-poor, two-parent family, being ready for school at age 5, mastering core academic and social skills by age 11, graduating from high school with decent grades and avoiding risky behaviors during adolescence, and obtaining a postsecondary degree or the equivalent income before age 30¹. These five benchmarks will be incorporated into the many aspects of the community development program and especially the human services program with the goal of moving families and children toward self-sufficiency and economic independence.

Architectural Accessibility Action Plan: In FY15, the City of Newton continued to monitor and work toward implementing the action plan. The City actively encourages housing developers to incorporate accessibility and visitability in all projects reviewed.

Public Information and Education: In FY15, the City of Newton's Fair Housing page on Facebook continues to be an online resource. The page includes information for landlords, tenants, homebuyers and lenders regarding fair housing rights and responsibilities. The page also includes the *Housing Discrimination Questionnaire*, instructions on how to file a formal fair housing complaint, examples of housing discrimination and past media campaigns completed by the Fair Housing Committee. In FY15, the RFHP draft was completed and included goals to increase knowledge about fair housing law through educational activities and public sector fair housing trainings.

Fair Housing Training: While the City did not offer any fair housing trainings during FY15, staff made it a priority to incorporate robust training goals into the *FY16-20 Consolidated Plan* and the *FY16 Annual Action Plan*. Staff is planning to offer two educational opportunities and to complete two outreach and marketing items in FY16. Complementing that effort, in FY15 the RFHP was developed and incorporated the goal to increase knowledge about fair housing law and coordinate the dissemination information on the resources. In FY16, the City of Newton and the HOME Consortium communities will work to meet that goal through securing additional resources to expand fair housing outreach and educational activities and deliver resources and fair housing trainings to public sector including elected and appointed officials and municipal staff in each WMHC municipality.

¹ The Brookings Institution Center on Children and Families. The Social Genome Project [Web post]. Retrieved August 24, 2015 from <http://www.brookings.edu/about/centers/ccf/social-genome-project>.

Civil Rights Access Checklist: In FY15, the Department continued to utilize its Civil Rights Access Checklist as part of its annual monitoring of HOME and CDBG sub-grantees. The Civil Rights Checklist evaluates civil rights compliance and current practices of sub-grantees with HOME and CDBG-funded housing development projects.

Fair Housing Complaints: Five housing complaints were filed and closed out with the Newton Human Rights Commission (HRC) in FY15. Three of the five individuals elected to pursue their complaints with the Commonwealth of Massachusetts. The remaining two individuals chose not to pursue their complaints with the City of Newton or any other entity.

ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

As described in more detail in the Priority #3 narrative above, the City has made progress in many areas of its FY15 proposed actions and continued to implement actions identified in its fair housing planning documents:

- Housing staff utilized its Civil Rights Checklist to ensure compliance and promote fair housing best practices for sub-grantees that received CDBG and HOME for housing development.
- The Fair Housing Committee continued to investigate the demand for accessible housing in the City and how it might be able to increase its supply.
- The City of Newton entered into a Voluntary Conciliation Agreement with Engine 6 supporters. This agreement stipulates, among other things, prominently posting the City of Newton's Fair Housing Ordinance and Fair Housing training for City employees.

NEWTON HOUSING REHABILITATION PROGRAM

Housing staff will continue to strengthen the cost competitiveness of the Housing Rehabilitation Program in FY15. The program works to maximize energy efficient resources when energy measures are part of a project's scope of work. Priority work items already include replacing obsolete heating systems; eligible work includes increasing energy conservation and weatherization measures.

In FY15, 22 individuals inquired about the Newton Housing Rehabilitation Program. This program provided financial assistance to twelve ongoing or new projects totaling \$355,474.53. Assistance is provided in the form of grants and deferred payment, zero-interest loans. Grants are issued for lead abatement, hoarding, mold removal, and relocation of the client, while loans cover all other construction and rehab work on the property. A sample of work completed in FY15 includes removal of lead and mold, correction of structural failures, and improvement of safety and accessibility. The Rehab/Construction Manager and Housing Planner are responsible for responding to the requests for assistance.

For the remaining inquiries, applicants either declined to proceed or were deemed ineligible for the program.

FIRST TIME HOMEBUYER ASSISTANCE PROGRAM

In June 2015, the Newton Board of Alderman approved the City's Community Preservation Committee recommendation to recapitalize the Newton Homebuyer program in the amount of \$1,057,000, and

increase the maximum subsidy given to a homebuyer to \$250,000 to \$275,000 to better reflect current market price conditions.

A Local Initiative Program (LIP) application for the Newton Homebuyer Program will be submitted in FY16 to the MA Department of Housing and Community Development. Once the LIP application is approved the marketing will begin. It is anticipated that approximately six units will be purchased under this program, and will be added to the City’s Subsidized Housing Inventory.

In FY15, the WestMetro HOME Consortium did not provide American Dream Downpayment Initiative (ADDI) assistance. The conflict between the Massachusetts Universal Deed Rider and the statutory requirements of the HOME Program remains as the significant impediment to providing ADDI assistance for eligible applicants also purchasing a deed restricted unit. If resolved, ADDI will be available in FY16.

First Time Homebuyer Funds Budgeted	Funds Expended in Current Year	Accomplishment
\$1,590,000 (CPA; including FY15 appropriation)	\$0	0 homebuyers assisted
\$7,544.67 (ADDI HOME funds)	\$0	0 homebuyers assisted

FY15 CDBG-funded Housing Rehabilitation Projects/CDBG-funded First Time Homebuyer Loans

As of the end of FY15, there were housing rehabilitation and first-time homebuyer loans outstanding, with a principal balance owed of \$4,711,787.52. A breakdown of the loans outstanding is provided below:

Loan Type	Number of Loans	Principal Balance Owed
Housing rehab direct loans	16	\$728,611.46
Housing rehab deferred loans	105	\$3,178,408.59
Housing rehab historic deferred loans	2	\$58,815.00
First-time homebuyer loans	11	\$745,952.47
Total	134	\$4,711,787.52

STATUS OF LOANS

FY15 CDBG and HOME-funded Housing Development Projects

At the end of FY15, there were 16 direct loan receivables totaling \$728,611.46 and 105 deferred loans receivable totaling \$3,178,408.59 for CDBG-funded housing rehab loans. There were 13 deferred loans receivable totaling \$2,079,963.42 from HOME-funded projects. Funding assistance is generally provided in the form of deferred forgivable loans at zero percent interest for 30-year terms. All projects are subject to a perpetual Declaration of Restrictive Covenants.

MONITORING**Housing Development and First Time Homebuyer Projects**

Housing staff are in the process of monitoring all CDBG and HOME-funded first-time homebuyer and rental projects in Newton in FY15. The City of Newton is the lead entity in the 14-member WestMetro HOME Consortium. The Consortium communities are monitored by FinePoint Associates, a private firm that provides monitoring services and technical assistance to the members on an annual basis. In FY16, FinePoint will monitor HOME-funded activities (including Newton projects) that will be identified through the WestMetro HOME Consortium's Risk-based Monitoring Plan. The City will complete the monitoring early in FY16. Finally, the City's independent audit for FY14 showed no findings of noncompliance for the HOME or CDBG programs. The FY15 audit is underway and will not be complete until FY16.

DISPLACEMENT AND RELOCATION

Two households were relocated temporarily while their homes were de-leaded.

ASSESSMENT OF GOALS AND OBJECTIVES - PUBLIC HOUSING

In FY15, the City provided \$11,519.00 in CDBG funds to enable the Newton Housing Authority to continue to fund the Resident Services Coordinator who provides social, recreational, and referral services to Housing Authority residents.

ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

In FY15, Newton continued to utilize the standardized affirmative marketing plan developed in FY13 for federally-funded projects with less than five units, which would otherwise not be subject to affirmative marketing requirements.

ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

Please refer to the Continuum of Care section for information on persons who are homeless or at-risk for homelessness.

ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS

Although the City did not fund a project that required Energy Star certification in FY15, the City incorporates a scope of work focusing on energy efficiency and indoor environmental quality into rehabilitation projects as appropriate. This work could include installation of energy efficient heating systems, water conservation fixtures, weatherization and insulation improvements and other items that would improve overall energy efficiency, tenant safety, and long-term cost savings.

FY15 Housing Development Accomplishments (CDBG and HOME-funded projects)

Active Projects	Funds Budgeted	Total Funds Expended		FY15 Status
		Funds Expended in Prior Years	Funds Expended in Current Year	
54 Eddy Street CAN-DO	\$690,250 CDBG	\$685,298.68 CDBG	\$4,951.32 CDBG	The property was rehabilitated and occupied in FY14. Funds provided for development 2 affordable for rental units for a household earning 50% and 80% AMI, respectively.
Myrtle Village	\$604,697 CDBG \$339,000 HOME	\$0	\$70,483.26 CDBG	Project financing complete and construction and occupancy expected for FY16.
TOTAL	\$1,294,947 CDBG \$339,000 HOME	\$685,298.68 CDBG	\$75,434.58 CDBG	

Active HOME Projects in FY15

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended in FY15	Project Status
54 Taft Avenue	\$1,144,029	\$125,000	2	2	0	Funds allocated; comp permit application in FY16
Myrtle Village	\$3,204,157	\$339,000	4	7	0	Project financing complete; FY16 Construction
TBRA Program	\$121,899	\$121,899	3	3	0	Ongoing selection process - FY16 commitment anticipated

FUNDS LEVERAGED

In order to both maximize the accomplishments achieved by the Newton Housing and Community Development Program and to make projects feasible, CDBG, HOME, and ESG funds often must be combined with other funding sources, as limited public funds may not cover the full cost of an activity. Listed below is a summary of the CDBG, HOME, and ESG funds expended during FY15 by the City of Newton and the funds leveraged through these expenditures.

Funds Leveraged with FY15 Newton CDBG, HOME, and ESG Funds

Program	CDBG Expenditures	HOME Expenditures	ESG Expenditures	Funds Leveraged
Housing Development	\$75,434.58 (54 Eddy Street and Myrtle Village)	\$0	\$0	\$2,533,925 (Total Myrtle Village) \$425,000 (Total 54 Eddy St.)
Housing Rehabilitation	\$355,474.53	\$0	\$0	\$0
Homebuyer Assistance	\$0	\$0	\$0	\$0

LEVERAGING

Federal resources from HUD that leveraged other public and private resources:

Category	Amount	Source
Additional HUD Grant(s) Leveraged	\$0	n/a
Additional Federal Funds Leveraged	\$0	n/a
Additional State Funds Leveraged	\$0	n/a
Locally Leveraged Funds	\$255,000 (Eddy Street, FY13) \$910,179 (Myrtle Village, FY15/FY16)	Community Preservation Funds
Other	\$120,000 (Eddy St., FY13) \$50,000 (Eddy St., FY13) \$1,623,746 (Myrtle Village – FY15/FY16)	Perm. Mortgage Private Foundation Perm. Mort/ Dev. Equity
TOTAL	\$2,958,925	

Goals and FY15 Outcomes

Goals	Proposed Outcome	FY15 Actual Outcome
Housing Development		
Affordable housing units	4	0
Homebuyer assistance	3	0
Housing Rehabilitation		
Housing Rehabilitation Program	14 units assisted	12 projects assisted (includes ongoing FY13, 14, 15 projects)

Households assisted with HOME funds by project in FY15

Project Name	Homeless Individuals	Extremely Low-Income	Low-Income	Moderate-Income	Total
There were no HOME funds expended on projects in FY15.					

PART G. ANNUAL PERFORMANCE REPORT (For CDBG projects only, no HOME projects funded in FY15)

Minority-Owned Business Enterprises

	Total	Alaskan Native or American Indian	Asian / Pacific Islander	Black non-Hispanic	Hispanic	White, non-Hispanic
Number of contracts	10				2	8
Value of contracts	\$190,298				\$78,270	\$112,028
Number of sub-contracts						
Value of sub-contracts						

*Note: Table reflects obligations and contracts signed in FY15 only. Does not include active contracts signed in previous fiscal years.

Women-Owned Business Enterprises

	Total	Women Owned	Male Owned
Number of contracts	10	4	6
Value of contracts	\$190,298	\$3,390	\$186,908
Number of sub-contracts			
Value of sub-contracts			

*Note: Table reflects obligations and contracts signed in FY15 only. Does not include active contracts signed in previous fiscal years.

HUMAN SERVICES

The objectives of the City of Newton CDBG Program were addressed in FY15 by 30 different public service projects that were funded by grants from the CDBG Program and carried out by 19 different sub-grantee agencies and City departments. Priority public service needs were met through services to several population groups: children, youth, adults and families, elders, people with disabilities, and people who are either homeless or at-risk of homelessness. All beneficiaries of the program have low to moderate income, and the number of people served is included in this section's tables.

The accomplishments within each group are summarized below:

Services to Children: Eight projects serving priority needs of children were funded in FY15. Each of the eight programs utilized CDBG funds to award subsidies to low- or moderate-income families who needed assistance with after-school child care or summer camp services. Low- to moderate-income families benefited from childcare during after-school hours to allow them to hold needed employment or to allow the possibility to complete educational and training programs. Children needed supportive, nurturing childcare to improve their social skills, increase their sensitivity to different racial, ethnic, and cultural groups, and to achieve a higher level of educational development.

Services to Youth: Three projects serving the priority needs of youth were funded in FY15. CDBG-funded services for youth included an evening drop-in center with recreational and leadership development components supervised by trained professional adults and a mentoring program matching troubled youth with trained and supervised adults; a youth outreach program operated by professional mental health workers to serve alienated and at-risk youth with a crisis counseling program for youth and their families; and a structured summer recreational activity program for youth of middle school and high school age. The services available through these three adolescent programs included crisis management, substance abuse prevention and treatment, outdoor recreational opportunities, group counseling, and individual and family therapy.

Services to Adults and Families: Five projects serving the priority needs of adults and families were funded in FY15. One of the programs addressed the particular needs of survivors of domestic violence through hotline services, support groups, and individual advocacy. Two of the programs provided counseling and case management to help treat mental health and substance abuse problems for individuals and families. Two provided emergency financial assistance to families. The adults served through these projects were brought into a network of assistance that included the search for affordable housing, childcare for working adults, help in resolving financial crises, and parenting education.

Services to Elders: Five projects serving the priority needs of elders were funded in FY15. Two of the CDBG-funded programs provided a variety of social services, including minimal-cost, flexible home care services that benefited frail elders in three different low-income elder housing developments. One program provided social service outreach, including preventive health and mental health services by nurses, to frail and isolated elders in the community. Two programs provided social services, nutrition and wellness education, cultural and educational events, recreation, and physical fitness classes. All of the funded programs provided information and referral services to elders to help them in finding

assistance for their healthcare and social welfare needs. An overall goal of all elder programs is to help them to maintain their independence and their ability to continue to live in the community.

Services to People with Disabilities: Six projects serving the priority needs of adults with disabilities were funded in FY15. One project assisted people with job education and training to help find jobs in their community; one project offered music therapy to people with extremely limited verbal skills; four projects helped people to experience integrated social situations and to learn social skills; and one project provided individuals with habilitation services.

Services to People who are Homeless or At-Risk of Homelessness: Seven projects served the priority needs of people who were homeless or at-risk of homelessness in FY15. Two programs were funded through CDBG and five were partially funded through the Emergency Solutions Grant (ESG) program. All the priority needs stated in Newton’s FY11-15 Consolidated Plan were addressed through these services. The CDBG-funded programs helped prevent homelessness through financial assistance for rent and utilities emergencies, as well as unforeseen catastrophic losses. Three programs received assistance with operating costs to help them provide emergency shelter services to homeless individuals and families, including survivors of domestic violence. Two programs provided case management and financial assistance to families and individuals who were homeless or at-risk of homelessness. One program provided funds for the renovation of a day shelter.

Public Services Summary: The Housing and Community Development Program of the City of Newton was able to successfully direct its CDBG and ESG funding to meet the priority needs of low- and moderate- income people of all ages including children, youth, elders, families, people with disabilities, and survivors of domestic abuse and people who were homeless or at-risk of homelessness. This funding has supported and enhanced programs that assist individuals and families to become more self-sufficient and to create new access to the services they need to either find suitable permanent housing or to stay in their homes and maintain their quality of life.

Race of People Served	People Served
White	5,364
African American	383
Asian	215
American Indian/Alaskan Native	12
Pacific Islander	5
Other Multi-Racial	111
Unknown	2
TOTAL	6,092
Ethnicity of People Served	People Served
Hispanic	238
Non-Hispanic	5,854
TOTAL	6,092
*Not all people who received services provided racial/ethnic status information	

FY15 Public Service Accomplishments

Population Served	Priority Needs	Projects Receiving Funds		CDBG Funds Received in FY15	Persons Assisted	Total Persons Assisted
Children	<ul style="list-style-type: none"> • Affordable childcare • Assistance to single mothers • Stabilization of families • Social support for parents and children 	<ul style="list-style-type: none"> • Bowen After School Program • John M. Barry Boys & Girls Club • Charles River Center • Newton Community Service Ctr. • Newton Partnership Inc. • Newton Parks & Recreation • Peirce Extended Day Program • Plowshares Education Development Center 	<ul style="list-style-type: none"> Tuition Assistance Program Kids Corps Summer Camp Scholarships Children’s Programs Scholarships Child Care Scholarships Child Care Scholarships Summer Camp Scholarships EDP Scholarships Child Care Scholarships 	<ul style="list-style-type: none"> \$5,730.00 4,490.00 2,274.00 1,356.00 15,574.97 11,471.00 2,268.00 6,196.00 11,471.00 	<ul style="list-style-type: none"> 16 12 18 2 11 15 85 30 9 	<p style="text-align: center;">198 people</p>
Adolescents	<ul style="list-style-type: none"> • Crisis Intervention • Case Management • Substance Abuse Prevention/Treatment • Drop-in Youth Centers 	<ul style="list-style-type: none"> • John M. Barry Boys & Girls Club • Newton Health & Human Services • Riverside Community Care • West Suburban YMCA 	<ul style="list-style-type: none"> Teen Programming Youth Outreach Program Family Crisis Stabilization Teen Center Program 	<ul style="list-style-type: none"> \$4,490.00 14,494.00 4,263.00 33,144.86 	<ul style="list-style-type: none"> 28 133 39 57 	<p style="text-align: center;">257 people</p>

Population Served	Priority Needs	Projects Receiving Funds		CDBG Funds Received in FY15	Persons Assisted	Total Persons Assisted
Adults/ Families	<ul style="list-style-type: none"> Health Care Services Affordable Housing Legal Services & Advocacy Substance abuse treatment Case management for multi-problem families 	<ul style="list-style-type: none"> Newton Community Service Ctr. Horace Cousens Industrial Fund REACH Beyond Domestic Violence Riverside Community Care Health and Human Services Dept. 	Parent Child Home Program	\$4,092.00	142	827 people
			Parents Program	23,703.00	122	
			Emergency Financial Assistance	13,432.00	96	
			Individual Support and Advocacy	3,809.00	212	
			Mental Health and Substance Abuse Recovery	17,620.00	255	
Catastrophic Financial Loss	29,330.00	0				
Elders	<ul style="list-style-type: none"> Affordable housing with supportive services Integrative services for isolated elders and immigrants 	<ul style="list-style-type: none"> Jewish Comm. Housing for the Elderly Newton Community Development Foundation Newton Senior Services Dept. Newton Housing Authority 	Caring Choices	\$ 10,095.00	62	4627 people
			Resident Services Program	19,473.00	387	
			Sr. Center Program Coordinator	17,620.00	3183	
			Social Services Program	24,578.00	541	
Resident Services Coordinator	12,652.00	454				
People with Disabilities	<ul style="list-style-type: none"> Affordable, accessible housing Job training and employment opportunities Available transportation 	<ul style="list-style-type: none"> Barry L. Price Rehabilitation Center Charles River Center Newton-Wellesley-Weston Committee for Community Living 	Job Developer/Job Coach	\$15,574.00	32	183 people
			Person-Centered Planning	2,944.00	23	
			Music Therapy	3,041.00	18	
			Clinical Services and Supports	5,321.00	40	
			Community Access Program	4,587.00	40	
Wednesday Drop-in Program	4,996.00	30				
FY15 Totals		30 Projects 19 Agencies and City Departments		\$330,088.86	6,092 people assisted	

FUNDS LEVERAGED

Since public funding alone is not usually adequate to complete projects and achieve accomplishments, CDBG, HOME and ESG funds often must be combined with other funding sources. Listed below is a summary of the CDBG, HOME and ESG funds expended during FY15 by the City of Newton and the funds leveraged through these expenditures.

FY15 Public Service Funds Leveraged with Newton CDBG, HOME and ESG Funds

Program	CDBG Expenditures	HOME Expenditures	ESG Expenditures	Funds Leveraged
Public Services	\$330,088.86	N/A	N/A	\$2,552,202.64

Public Services and Emergency Solutions Grant Programs

Housing and Community Development staff members, along with Human Service Advisory Committee members, conduct annual monitoring of CDBG-funded public service projects and Emergency Solutions Grant projects. In FY15, monitoring was performed on nine human service projects, and staff is in the process of scheduling monitoring visits for ESG projects. In addition, City staff makes direct phone and e-mail contacts on a monthly to quarterly basis with every individual agency. Such contacts are made for the purpose of discussing their activities and their progress in meeting project goals. The City also has access to ESG project data through the designated HMIS of the Continuum of Care. In addition to personal contacts with agencies, each project submits program reports on a quarterly basis to provide information about project outcomes and numbers of low- and moderate-income individuals served. Housing and Community Development staff members provide technical assistance and are available for trainings throughout the grant period.

FY15 Proposed and Actual Outcomes

CDBG Public Services Priorities for FY15	Proposed Number Assisted	Actual Number Assisted
Elder services	3,265 people	4,627 people
Adolescent services	655 people	257 people
Children’s services	300 people	198 people
Adult/family services	592 people	827 people
Services for people with disabilities	217 people	183 people

ARCHITECTURAL ACCESS

In FY15, three of eleven active CDBG-funded access projects were completed and considerable progress was made in high priority areas addressed in the FY15 Annual Action Plan.

PRIORITY #1: PUBLIC THOROUGHFARE IMPROVEMENTS

At the end of FY14, the City's Commission on Disability, which serves as the resident advisory body for CDBG-funded accessibility improvements, identified and approved a list of eleven "priority" intersections slated for curb cut improvements. The selection process assessed the condition of existing curb cuts, proximity to a village center, large intersection, or polling place, and recommendations from other City departments or residents. This list was shared Citywide, and the Engineering Department began to draft designs for the selected intersections in FY15.

Of this list, two of the intersections were included in the City's FY2016-2020 Five-Year Capital Improvement Plan, released in October 2014. As a result, these two intersections will likely not require CDBG funding for completion. Two additional priority intersections were completed by the City in FY15, without the need for CDBG funds. Designs are presently in progress for the remaining seven intersections.

Additionally, eight curb cuts, along with a pedestrian island and speed table, were constructed at the intersection of Park and Vernon Streets in the Newton Corner target neighborhood. While this project was completed using Neighborhood Improvement funds, its design advances the goal of improving accessibility throughout the City for the benefit of persons with disabilities, residents, and visitors.

PRIORITY #2: PARKS AND RECREATIONAL FACILITIES ACCESS IMPROVEMENTS

The City anticipates installing three new accessible paths in Newton Centre Park and Playground, funded with FY13, FY14, and FY15 funds, in spring 2016. The City's Engineering Division completed the design work, and the City's Conservation Commission approved the project in late 2014.

PRIORITY #3: ACCESS IMPROVEMENTS TO PUBLIC BUILDINGS

The Education Center Accessible Building Directory project, from FY14, was re-programmed in FY15, and funding was transferred to the FY14 APS budget. No access improvements were made to Public Buildings in FY15.

SUCCESS AND INDIVIDUALS SERVED

The City of Newton has had positive experiences and has had success in implementing these projects, and believes that no changes are needed to the program at this time.

HUD has determined that the beneficiaries of architectural access projects are considered to be "adults meeting the Bureau of the Census' Current Population Reports definition of 'severely disabled,'" and are presumed to have low to moderate incomes. Based on both this beneficiary definition and data from the five-year estimates from the 2013 American Community Survey, these citywide improvements provide new, improved, or no longer substandard access to the City's 5,821 residents with disabilities.

FY15 Proposed and Actual Outcomes – Architectural Access

Goals	Proposed Outcome	Actual Outcome
Public thoroughfare improvements	4 curb cuts constructed	8 curb cuts constructed (funded through CDBG Neighborhood Improvements funds)
Public building improvements	0 improvements	0 improvements
Parks and recreational facilities improvements	1 improvement	0 improvements
Nonprofit agency improvements	0 improvements	0 improvements

FY15 Architectural Access Accomplishments

Consolidated Plan Objectives	Active Projects	Funds Budgeted	Total Funds Expended	Funds Expended in FY15	Project Status
Public Pedestrian Access	Accessible Pedestrian Signals (FY13)	\$6,609.25	\$0	\$0	Requires completion of improvements at Centre & Centre in Newton Corner
	Retrofitting Curb Cuts (FY13)	\$4,548.82	\$0	\$0	Underway
	Audible Pedestrian Signals (FY14)	\$13,000	\$0	\$0	Underway
	Curb Cuts Funding Pool (FY15)	\$205,987.71	\$0	\$0	Planning Stages
	Commonwealth & Washington (FY12)	\$83,170.60	\$61,283.28	\$649.14	Complete
Parks & Recreational Facilities Access	Newton Centre Playground Pathway – Phases IV, V, VI (FY13,14,15)	\$130,000	\$165.10	\$0	Underway
Public Buildings Access	Jackson Homestead – Archives Access (FY11)	\$40,000	\$33.98	\$0	Funding to be reprogrammed (Project to be completed by Public Buildings Dept.)
5 Active Projects / 1 to be Reprogrammed		\$483,316.38	\$61,482.36	\$649.14	

ECONOMIC DEVELOPMENT

The City of Newton continued one economic development program in FY15: the Façade Improvement Program for small businesses located in the village of Nonantum. In FY13, the Community Development staff had been looking for new opportunities to assist the business community, particularly in the target neighborhoods. At the time, the Economic Development Advisory Committee (EDAC), comprised of three members of the business and nonprofit community that help guide the City's allocation of CDBG economic development funds, requested that staff evaluate the current programs' viability and look for other ways to foster economic development using CDBG funding.

Following a thorough analysis by the Planning and Development Department staff and based on the recommendations of the EDAC, expressions of interest from the business community, a review of the *Newton Comprehensive Plan*, which emphasizes vibrant attractive village centers serving adjacent residential communities and identifies the need for incentives for small business development in those village centers, and the options allowed within the CDBG program, a façade improvement program was determined to be one way to address these collective interests. This program took the place of two previous programs: the Microenterprise Loan Program and the Family Day Care Grant Program.

One business owner participated in the Façade Improvement Program and completed the installation of signage showcasing her business in FY14. While staff received several inquiries into the program, there were no completed applications or façade improvements in FY15.

The Microenterprise Loan Program was designed to assist in the creation, continuation, or expansion of microenterprises in Newton through low-interest loans of up to \$35,000. To qualify, an applicant either had to be a low- to moderate-income business owner or be willing to create a job to be filled by a low- to moderate-income person. Historically, there has never been a big demand for the Microenterprise Loan Program. The program typically generated a handful of inquiries and averaged less than one loan approval per year. The program is no longer actively receiving inquiries or making loans; however, the remaining recipient continued to make loan payments in FY15.

In FY15, Community Development staff began exploring alternate economic development programs for inclusion in the *FY16-20 Consolidated Plan*, including job training programs through partnerships with local employers to increase employment opportunities for low- and moderate-income residents.

MONITORING

Monitoring in various forms was undertaken for economic development programs. Each microenterprise was monitored via a delinquent loan report issued by the bank that services the loans each month, which allows for early intervention in the event of a late payment. Upon

consecutive missed payments, a delinquent payment notice would be issued to the borrower and a follow-up phone call would be made as necessary.

FY15 Microenterprise Assistance Projects in Repayment

Project	Year Assisted	Amount of Assistance	LMI Entrepreneurs Assisted	LMI FTE Jobs Created	Principal Owed as of 6/30/15
DSH Design Group	FY04	\$35,000	0	1	\$0
Lincoln Street Coffee	FY05	\$35,000	0	2.5	\$0
Brussels Sprouts	FY06	\$35,000	1	0	\$0
Cocoa Metro	FY10	\$15,000	1	0	\$0
Total Loans*		\$155,000	2	3.5	\$0

*As of 6/30/15, all four loans have been paid off: Lincoln Street Coffee in FY13, Brussels Sprouts and Cocoa Metro in FY14, and DSH Design Group in FY15.

FY15 Proposed and Actual Outcomes – Economic Development

Goals	Proposed Outcome	Actual Outcome
Façade Improvement Loan	0	0

FY15 Façade Improvement Program

Active Projects	Funds Budgeted	Total Funds Expended	Funds Expended in FY14	Project Status
Econ. Dev. Revolving Loan Pool	\$153,484.32	\$0	\$0	Ongoing
0 Active Projects	\$153,484.32	\$0	\$0	

NEIGHBORHOOD IMPROVEMENTS

Neighborhood improvement projects are carried out in four target neighborhoods, including portions of Newton Corner, Newtonville, Nonantum, and West Newton. These target neighborhoods are composed of the Census block groups in Newton with the highest concentrations of low- and moderate-income people. Funds for neighborhood improvement projects are distributed among the four target neighborhoods on a three-year rotating basis, with Nonantum and Newton Corner receiving funds every three years and Newtonville and West Newton sharing alternating slots.

In FY15, the Newtonville target neighborhood received CDBG Neighborhood Improvement funds. Listed below are the funding priorities for Newtonville as stated in the *FY11-15 Consolidated Plan* and the *FY15 Annual Action Plan* followed by a description of accomplishments achieved during the fiscal year.

FY14 PRIORITY: NEWTONVILLE TARGET NEIGHBORHOOD

Priority #1: Pedestrian Safety and Accessibility Improvements

- Newtonville Pedestrian Accessibility Improvements (\$80,000)

Priority #2: Parks/Open Space Improvements

- Court Street Open Space Plan (\$20,000)

ADDITIONAL NEIGHBORHOOD IMPROVEMENTS ACCOMPLISHMENTS

Accomplishments in FY14 included completion of the following projects:

- Newton Corner Pedestrian Safety Improvements: Traffic-calming improvements were completed at the intersection of Park Street at Vernon Street in September 2014. Eight (8) accessible curb cuts, as well as a pedestrian island and speed table were constructed.

Several projects are in the final planning and design phases and are expected to be completed in FY16. Some of these projects include:

- 1) Newtonville Pedestrian Improvements (Newtonville): This project will focus on street and sidewalk repairs as well as pedestrian access improvements in one of the City's target neighborhoods.
- 2) Pellegrini Park Improvements (Nonantum): The current phase of this project, started in FY14, will be completed in the fall of FY16 with the purchase and installation of a shade structure.
- 3) Farlow Park Improvements – Phase 3 (Newton Corner): This project involves the restoration of the parks' historic pond and bridge. Planning and Development Department staff will work with the City's Parks and Recreation Department to help fund and complete this phase of work.

The following table provides a breakdown of CDBG grant funds spent on activities addressing each neighborhood improvement goal and objective during FY15. Neighborhood improvement projects from prior fiscal years that were active in FY15 are listed in addition to the new FY15 neighborhood improvement projects.

FY15 Proposed and Actual Outcomes – Neighborhood Improvements

Goals	Proposed Outcome	Actual Outcome
Parks/Open Space Improvements	1	0
Pedestrian safety Improvements	1	1 project (8 curb cuts)

FY15 Neighborhood Improvements Accomplishments

Target Neighborhood	Priorities	Projects (Year Funded)	Low/Mod* Residents Out of Total Service Area Population	Current Budget	Total Funds Expended	Funds Expended in Current Fiscal Year	Project Status
Nonantum	Parks	Pellegrini Parks Improv. (FY14)	2,387/6,754 35.3%	\$244,315.26	\$214,037.44	\$4,635.81	Under Construction
Newton Corner	Traffic	Newton Corner Pedestrian Safety Improv. (FY10)	1,091/3,849 28.30%	\$51,613.88	\$18,671.16	\$17,781.68	Planning Stages
	Parks	Farlow Chaffin Parks Improv. (FY09)	745/2143 34.80%	\$40,809.93	\$6,160.14	\$0	Planning Stages
	Parks	Farlow Park Improvements – Phase 3 (FY15)	850/1990 42.70%	\$75,000	\$0	\$0	Planning Stages/ Under Contract

FY15 Neighborhood Improvements Accomplishments (continued)

Target Neighborhood	Priorities	Projects (Year Funded)	Low/Mod* Residents Out of Total Service Area Population	Current Budget	Total Funds Expended	Funds Expended in Current Fiscal Year	Project Status
Newtonville	Traffic	Newtonville Pedestrian Accessibility Improvements (FY15)	225/675 33.33%	\$80,000	\$0	\$0	Planning Stages
	Parks	Court Street Open Space (FY15)	225/675 33.33%	\$20,000	\$0	\$0	To Be Re-Programmed
	Parks	Lowell Park Improvements (FY09)	1,470/4,912 29.9%	\$134,403	\$124,786.82	\$1,099.99	Planning Stages or To Be Re-Programmed
FY15 Totals	6 active projects; 1 to be reprogrammed			\$646,142.07	\$363,655.56	\$23,517.49	

*26.3% low/moderate income threshold must be met for project to be eligible in Newton target neighborhood. For projects beginning in FY15, a 30.68% low/moderate income threshold must be met based on the July 2014 LMISD released by HUD.

**CONTINUUM OF CARE &
SERVING THOSE WHO ARE HOMELESS OR AT-RISK OF HOMELESSNESS**

One of the goals of the Housing and Community Development Program is to fund programs and services for people who are homeless or at-risk of homelessness. The City of Newton serves as the collaborating entity between the communities of the Brookline-Newton-Waltham-Watertown Continuum of Care (BNWW CoC), administers available Emergency Solutions Grant (ESG) funding, and targets CDBG funds as applicable. Beneficiaries of these programs all have low to moderate incomes. The *FY11-15 Consolidated Plan* identified the following priority needs for people who are homeless or at-risk of homelessness:

- Continue to support existing emergency shelter, transitional housing, and permanent supportive housing for homeless individuals and families;
- Continue to use CDBG, Continuum of Care, and other financial resources to create more units of permanent affordable housing to enable residents of transitional housing programs to become self-sufficient; and
- Continue to support prevention programs for individuals and families at-risk of homelessness.

FY15 CDBG and ESG Accomplishments

Con. Plan Objectives	Active Projects	Funds Budgeted	Funds Billed in Fiscal Year	Target Population	Number Assisted
Housing and Prevention Services	The Cousens Fund – Emergency Rent and Utilities Program	\$10,858 CDBG	\$10,858 CDBG	People at-risk of homelessness	96 People
	Brookline Community Mental Health Center – Rapid Re-housing	\$14,644 ESG	\$10,766.59 ESG (plus \$2,090.77 in FY13 funds)	Homeless Families and Individuals	12 People
	Brookline Community Mental Health Center – Homelessness Prevention	\$36,644 ESG	\$32,562.57 ESG (plus \$7,048.22 in FY13 funds)	People at-risk of homelessness	47 People
	Brookline Community Mental Health Center – Street Outreach	\$10,000 ESG	\$9,166.65 ESG	Families and individuals at-risk of homelessness	11 People

Con. Plan Objectives	Active Projects	Funds Budgeted	Funds Billed in Fiscal Year	Target Population	Number Assisted
Housing Prev. (cont.)	The Second Step – Homelessness Prevention	\$7,500 ESG	\$6,509 ESG	Families at-risk of homelessness	34 People
Emergency Shelter Services, Operations, and Renovations	Middlesex Human Service Agency – Bristol Lodge Women’s and Men’s Emergency Shelters	\$12,871 ESG	\$12,871 ESG	Homeless individuals	364 People
	Second Step – Transitional Residence	\$24,001 ESG	\$21,867 ESG (plus \$8,595 in FY13 funds)	Transitional housing for survivors of domestic violence	32 People
	REACH – Emergency Shelter	\$10,751 ESG	\$10,751 ESG	Emergency shelter for survivors of domestic violence	43 People
	Community Day Center of Waltham – Shelter Renovation	\$16,051 ESG	\$16,051 ESG	Renovation	NA
HMIS & Admin	City of Newton	\$10,740 ESG	\$3,801.69 ESG (plus \$2,310.96 in FY14 funds)	Administration	NA
	REACH and The Second Step	--	\$6,500 (FY14 funds)	Data Management	NA
FY15 Totals		\$10,850 CDBG \$143,202 ESG (FY15 Only)	\$10,850 CDBG \$150,891.56 ESG	639 People Assisted	

ESG AND CDBG OUTCOMES

The City of Newton, as the administrator of ESG funds within the Brookline-Newton-Waltham-Watertown Continuum of Care (CoC), has been working to coordinate efforts to more efficiently and effectively utilize limited resources. During FY15, the Housing and Community Development Department successfully used CDBG and ESG funds to address each priority need from the Consolidated Plan. Five programs (one CDBG and four ESG) working to prevent families from becoming homeless, including street outreach, and to rapidly house those who do become homeless served 200 individuals. The emergency shelters for individuals accommodated 364 persons in FY15. The two programs providing emergency shelter services to survivors of domestic violence served 75 individuals, including 38 children.

The City of Newton's progress in meeting objectives for reducing and ending homelessness begins with outreach and the annual Point in Time (PIT) Count. In FY15, the City, as Collaborative Applicant for the CoC, coordinated the PIT on February 25, 2015. This included a count of sheltered and unsheltered homeless individuals and families within the CoC. The City of Newton, through its leadership within the CoC and administration of CDBG, ESG, and CoC funds, supports and furthers the efficacy of programs and services addressing the needs of the homeless populations in the City and throughout the CoC. These programs involve a range of services for homeless individuals and families including supportive services, emergency shelter, transitional housing and permanent supportive housing for chronically homeless individuals and families, survivors of domestic violence, veterans and their families, and unaccompanied youth. The City acknowledges that the prevention of homelessness is a financially prudent means of addressing homelessness, as demonstrated through the funding of programs assisting families/individuals experiencing crisis or financial hardships and working to rapidly re-house those who have become homeless. The efforts of the City provide homeless populations with assistance in transitioning to housing, accessing mainstream benefits, and achieving and sustaining an enhanced quality-of-life.

FY15 Proposed and Actual Outcomes – Persons Served

Goals	Proposed Outcome	Actual Outcome
Emergency Shelter	392 people	439 people
Homelessness Prevention	295 people	177 people
Rapid Re-housing	70 people	12 people
Street Outreach	17 people	11 people

Race of People Served	People Served
White	410
African-American	190
Asian	9
Native American/Alaskan Native	4
Other Multi-Racial	26
TOTAL	639
Ethnicity of People Served	People Served
Hispanic	107
Non-Hispanic	532
TOTAL	639

The information below provides details about the performance of each program funded, and how they meet a variety of needs present within the community:

- The Horace Cousens Industrial Fund – Emergency Assistance for Rent and Utilities: This program assisted 25 households in providing support to families facing a financial emergency that could result in a loss of housing.
- Middlesex Human Service Agency – Bristol Lodge Men’s/Women’s Shelters: In FY15 these shelter programs helped several people move into transitional living facilities in Cambridge as well as helped several people gain access to sober living facilities. Multiple persons served moved into their own studio apartments.
- REACH Beyond Domestic Violence – Emergency Shelter: This year, 43 people, including 20 under the age of 18, participated in this program. In the last quarter of FY15, an additional three individuals and/or families moved out of the shelter into long term living situations. REACH also introduced the Measure of Victim Empowerment Related to Safety (MOVERS) metric to help clients increase internal and external resources during their stay.
- The Second Step – Transitional Residence: During FY15, this program served 32 people, including 18 under the age of 18. All families at the residence gained access to entitled benefits. Four families moved from transitional housing into permanent housing.
- The Second Step – Homelessness Prevention: In FY15, this program kept 10 formerly homeless households in safe and permanent housing; provided a lock change to one household to allow her to stay in her home; assisted with a housing search, which secured permanent housing for 2

households; and prevented eviction through the provision of stabilization services for 7 households.

- Brookline Community Mental Health Center – Homelessness Prevention, Street Outreach, and Rapid Re-housing: In FY15, the organization served 70 individuals, including 29 children, across the three funded programs. This year is the first that BCMHC was awarded funds for street outreach. Services ranged from case management and budgeting to financial assistance to prevent homelessness and the housing of households already homeless.
- The Community Day Center of Waltham – Shelter Renovations: During FY15, the Community Day Center completed its renovations and moved into its new space located at 16 Felton Street. In addition, the organization served 675 different guests this past year (excluded from totals above because ESG funded renovations only.)

EMERGENCY SOLUTIONS GRANT MATCH

Each agency receiving Emergency Solutions Grant funds matches the ESG funds with, at least, an equal amount of funds from other sources. All funded agencies report that their total of matching funds exceeds the required match and the majority of agencies are many times over the required match. A breakdown of the source and amount of match received is provided below:

Source of Match	Amount
Non-ESG HUD Funds	\$171,240
Other Federal Funds	\$44,000
State Government	\$1,102,881
Local Government	\$33,080
Private Funds	\$79,043
Other (Cash, In-Kind Donations)	\$35,670
Program Income	\$3,764
Total	\$1,469,678

BROOKLINE-NEWTON-WALTHAM-WATERTOWN CONTINUUM OF CARE

The City of Newton is the Collaborative Applicant in the CoC and is responsible for submitting the CoC Consolidated Application for McKinney-Vento funds for homelessness assistance programs each year. The most recent application to HUD, submitted in October 2014, included a request for \$1,505,707 for 15 project renewals. In response to the application the CoC received \$1,419,518 in project renewal funds. Funds were distributed among five housing and human service providers including Advocates, Inc., Brookline Community Mental Health Center, Pine Street Inn, The Second Step, the Brookline Housing Authority, and Vinfen. Of the total funds received, \$754,652 was for Newton-based projects. These funds have been used to provide housing and supportive services for homeless people at transitional housing and permanent supportive housing sites in each of the four BWNN CoC communities. The City intends to apply for McKinney-Vento funds in FY15 as well as continue its role as lead in managing the CoC.

In FY15, the CoC continued to develop and follow strategies outlined in its Ten-Year Plan to End Homelessness. This plan was created in FY14 in response to the U.S. Interagency Council on Homelessness challenge to communities. The focus of the plan is to effectively end homelessness within

ten years via strategies that focus on prevention, permanent housing alternatives and supportive services as well as engagement of key stakeholders and public education and awareness. The plan identifies the necessary strategies, action steps, time frames and key partners needed in order to meet the goal of ending homelessness within the CoC by 2024.

Also in FY15, the CoC continued to implement its Action Plan that was developed from the HUD-initiated CoC Check-up process of FY12. The Action Plan determines the CoC's activities relative to building governance and organizational infrastructure, increasing HMIS data integrity, expanding administrative and organizational capacity, and furthering housing services (e.g. reducing and eliminating homelessness) in the four member communities of the CoC. Specifically in FY15, the CoC began the process of revising operating guidelines, as well as developing an extensive coordinated entry/assessment system for pilot implementation early in FY16.

Additional functions of the CoC are coordinating and performing the annual HUD Point-in-Time (PIT) count of homeless persons. In FY15, the PIT was conducted from sundown on February 25 through sunrise on February 26, 2015. The City of Newton, in collaboration with the Town of Brookline, facilitates the PIT and Housing Inventory Count (HIC) on an annual basis; this is the principal way in which the City systematically reaches out to the homeless and, once the data is tabulated, is able to assess their needs. There were a total of 213 sheltered households for a total of 530 persons within the CoC on the night of the PIT Count. Out of those 213 households, the Massachusetts Department of Housing and Community Development (DHCD) shelters 141 households in motels located in the City of Waltham. These families are comprised of approximately 427 persons, including 235 children under the age of eighteen. In addition, the FY15 PIT included a count of unsheltered individuals and families. There were 39 unsheltered households for a total of 50 persons. In FY16, the City will facilitate the HIC and PIT count for the sheltered homeless on a day during the last 10 days of January 2016.

The CoC conducted the Unaccompanied Homeless Youth Count for the second year in a row in FY15. This effort was funded by a grant from the Commonwealth of Massachusetts' Department of Housing and Community Development. Newton and Brookline staff worked with emergency shelter providers, juvenile probation officers, law enforcement, human service providers and school administrators to identify and survey unaccompanied homeless youth under the age of 25. The Unaccompanied Homeless Youth Count began on the same night as the Point-in-Time Count and ended on March 3rd. Seven unaccompanied homeless youth completed this survey.

CITIZEN PARTICIPATION

One of the key strengths of the Newton Housing and Community Development Program is the large number of committed volunteers who inform program decisions. Eight advisory committees provide ongoing feedback on the direction of the Housing and Community Development Program. These residents and business owners play a crucial role in grounding the Program in the community. Newton is fortunate to have an extremely active community of residents who helped Program staff achieve a number of goals during FY15, including the creation of the FY16-20 Consolidated Plan.

ANNUAL PERFORMANCE HEARING/PUBLIC COMMENT PERIOD

The draft *Consolidated Annual Performance and Evaluation Report* (CAPER) will remain posted to the City's website from August 31 through September 23, 2015. The draft will also be presented at the Annual Performance Public Hearing on September 8, 2015 during the Planning and Development Board meeting.

Hard copies of the CAPER will be made available to the public throughout the 15-day comment period (September 8 through September 23, 2015). In addition, notice of the draft CAPER's availability and the date of the Annual Performance Hearing will be included in the Planning and Development Department's weekly report that is distributed digitally to several hundred recipients. A notice for the public hearing was published in the *Newton Tab*, as well as in the newspapers of the thirteen other WestMetro HOME Consortium communities during the week of August 17. After the public hearing, a notice of the comment period will be in the Planning and Development Department's weekly report, with distribution dates of September 4 and 11, 2015.

COMMENTS

Written Comments

No written comments were received.

Public Hearing Comments

There were several comments received during the public hearing regarding the performance report. Planning and Development Board members asked for clarification on the Newton preference as part of the tenant-based rental assistance program, as well as the minimum 120-day period to find a unit located in Newton. Board members also asked for additional information regarding the expenditure of ADDI funds. Housing staff responded with an explanation of the conflict with the program's guidelines. Board members requested more information on the role of FinePoint Associates. Housing staff responded that the firm completed monitoring of HOME projects throughout the Consortium. Additional discussion took place regarding a breakdown of costs per person served for the City's Human Services program.

PART II
HOME PROGRAM
WESTMETRO HOME CONSORTIUM

TOWN OF BEDFORD

The Town of Bedford has an active affordable housing program, and has addressed the goals and objectives established in the FY15 Annual Action Plan. This CAPER report primarily reports on HOME-funded projects and activities, and does not cover all affordable housing initiatives in Bedford.

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES – OVERALL

Bedford has made progress in meeting its HOME specific housing goals and objectives.

Priority #1: Housing needs of small family renters with incomes between 31 and 80 percent of AMI.

Bedford approved an amendment to its Annual Action Plan in FY15 to start a Tenant-Based Rental Assistance Program. The program proposed to offer rental assistance to low- to moderate-income qualified residents to pay their rental security deposits. The program is designed to provide federal HOME funding to assist households in obtaining and retaining permanent housing, thus helping to eliminate housing barriers. The Program will be designed to meet all HOME requirements (24 CFR 92.209), and will serve low income (60% AMI or under) households with security deposit and first month's rent for apartments at affordable rent limits (not to exceed the Bedford Payment Standard). The program will operate on a first-come, first-served basis as long as funding is available.

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES – PUBLIC HOUSING

The Bedford Housing Authority (BHA) maintained family and elderly/disabled housing with the support of local agencies and finances. The BHA offers services including: English as a Second Language classes, monthly blood pressure clinics, and flu shot clinics. There is a tenant association that holds monthly meetings and the BHA sponsored an annual cook-out for Ashby Place tenants.

An energy efficiency and safety project at Elm Street, a family housing development, began in FY11, and included the replacement of boilers, chimney upgrades and repairs, insulation, and other exterior improvements. The project was funded by Community Preservation Act funds, state DHCD funds, and the BHA.

The 29 Railroad Ave project was started in FY14. This project consists of the moderate rehabilitation of an existing duplex owned by the Bedford Housing Authority containing two 4- bedroom units. Both units are leased to The Edinburg Center, who operates a group home under contract with the Massachusetts Department of Developmental Services. The BHA developed this property for use as a group home in 1989 and it has been continuously occupied since that time. The scope of work includes replacement of the driveway, repairs to the walkways, new furnaces and condenser units, reconstruction of the emergency exit, and kitchen renovations. There will be a total of one High HOME-assisted unit. The total HOME budget is \$101,829 which is below the maximum HOME subsidy per unit for a 4-BR (\$280,430/unit) and it meets the required HOME proportionality rule. The BHA replaced the roof this year with its own funds. The unit will be maintained as affordable under the HOME program for 15 years. Construction for this project is underway and is almost complete.

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended in FY15	Project Status
Railroad Avenue	\$101,829	\$101,829	2	2	\$82,141	In Progress

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

All of Bedford’s affordable units are affirmatively marketed. The Bedford Housing Partnership approves all marketing plans for developments with affordable units. A large component of the marketing plan requires the developer to specifically list all of the methods they will use to affirmatively market the units. Women-owned businesses, including attorneys and lottery agents, have been on the development teams of several projects. Bedford also follows the guidelines that require outreach that targets minorities.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

In FY15, Bedford supported the completion of the WestMetro HOME Consortium Regional Fair Housing Plan. Bedford will undertake the outlined activities in the action plan including fair housing training sessions in FY16.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

The Bedford Veterans Quarters continued to provide housing and services for sixty homeless veterans in FY15. Fifty-seven of the residents receive Section 8 certificates and these homeless individuals have permanent homes. The housing project was completed and occupied in FY08. An additional 70 units of housing were created in FY15 for veterans, with some units rented to persons earning below 30% of AMI.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS

Bedford promotes Energy Star units, and has approved the MA STRETCH CODE, which is intended to achieve 25% better efficiency in all new construction projects.

PART B. LEVERAGING

The Railroad Avenue project does not use local funds in addition to the HOME funds.

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

The Bedford Housing Partnership includes a representative from the Planning Board and Housing Authority, in addition to a liaison from the Board of Selectmen. Both representatives ensure that there is close coordination among the groups. The Town also established a Municipal Affordable Housing Trust, as allowed in Massachusetts. It replaced the Bedford Housing Trust, a 501(c)(3) trust and has lessened the overall cost of administering affordable housing. Citizen participation was included in the HOME expenditures in accordance with the Consortium Plan.

PART D. MONITORING

Bedford staff completed monitoring to confirm continued ownership and residency of ADDI loan recipients. In FY15, staff monitored 447 Concord Road for HOME compliance. No problems were

evidenced during this monitoring. In addition, through the RHSO, the Town has monitored non-HOME affordable rental and ownership developments.

PART E. DISPLACEMENT AND RELOCATION:

N/A

PART F. STATUS OF LOANS

Two ADDI loans were outstanding: one for \$4,668 (issued in 2006) and one for \$2,451 (issued in 2007)). The loans will be repaid upon resale of the properties. A forgivable loan of \$95,705 was made to 447 Concord Road LLC in FY08 and has not yet been repaid.

PART G. ANNUAL PERFORMANCE REPORT:

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
20 Railroad Ave.*			
Renter households	2*	--	2
Owner households	--	--	--
*Project currently underway and will be completed in FY16			

Minority Owned Businesses						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non- Hispanic	Hispanic	White non- Hispanic
Number of contracts	1	--	--	--	--	1
Dollar amount of contracts	\$101,829	--	--	--	--	\$101,829
Number of sub-contracts	--	--	--	--	--	--
Dollar Amount of sub-contracts	--	--	--	--	--	--

Women Owned Businesses (compared to Male Owned Businesses)			
	Total	Women Owned	Men Owned
Number of contracts	1	1	--
Dollar amount of contracts	\$101,829	\$101,829	--
Number of sub-contracts	--	--	--
Dollar Amount of sub-contracts	--	--	--

TOWN OF BELMONT

Part A1. Assessment of Goals and Objectives – Overall

During FY15, Belmont continued to address the Town’s three housing priorities:

- Priority 1:** Housing needs of elderly owners
- Priority 2:** Housing needs of elderly renters
- Priority 3:** Housing needs of small family renters.

The Planning Board granted a Special Permit for a mixed-use development in Cushing Square, known as Cushing Village, in July of 2013. Once complete, the development will include approximately 12 affordable rental units (a mix of studios, one-, and two- bedroom units) as required under the Town’s Inclusionary Housing By-Law (§6.10 of the Zoning By-Laws). Unfortunately the developer has faced significant challenges securing financing for this project and construction has been delayed. The developer expects to begin construction in the fall of 2015, in FY16.

In FY15, the Belmont Housing Trust (Trust) began to implement the Town’s first time homebuyer program. This program secured \$165,000 in Community Preservation Act funds in FY14 for three participants. Members of the Trust met with local realtors and banks, marketed the availability of these funds, and held a lottery to select participants. Three families were chosen: one family for a one-bedroom unit and two families for two-bedroom units. Unfortunately due to financial constraints, only one two-bedroom unit will be funded. The chosen families now have six months to find a suitable unit to purchase.

A Comprehensive Permit was granted in 2007 for the construction of 298 apartments (25% of which will be affordable) for the development known as the Belmont Uplands. After numerous legal challenges were resolved, a Building Permit was issued on April 9, 2015, for the development and the developer cleared the property. Work will continue on this project into FY16.

Town staff continued to work through the process of developing a Housing Production Plan. The Metro West Collaborative Developers (MWCD), a nonprofit housing partnership consisting of the Belmont Housing Trust, Lexington Housing Partnership, Watertown Community Housing, and Waltham Alliance to Create Housing, secured a grant from the Metropolitan Area Planning Council (MAPC) to draft the Housing Production Plan. The Trust hopes to conclude this process in FY16.

The Belmont Housing Trust, with the assistance of MWCD, continued to investigate opportunities for affordable housing projects within the Town of Belmont. Several opportunities appear to be very promising, though nothing came to fruition in FY15.

HOME Projects Active in FY15

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended in FY15	Project Status
There were no active projects in FY15						

Part A2. Assessment of Goals and Objectives - Public Housing

A member of the Belmont Housing Authority sits on the Belmont Housing Trust. The Trust was deliberately set up this way so that residents associated with the Housing Authority are properly informed of housing programs that might benefit them. It also ensures that each can work collaboratively to further the agenda of providing safe, decent, and affordable housing for all.

For a second consecutive year, the Housing Authority secured a Community Preservation Act funding to upgrade the electrical service found within the Belmont Village development, 100 units of family housing. This funding will be used to upgrade the electrical service within each dwelling unit, which has not had significant upgrades for at least 40 years.

Barriers to improvements to public housing include: the lack of funding and staff (both for the Housing Authority and Town) the increasing age of the housing stock, and the limited opportunities for development.

Part A3. Assessment of Goals and Objectives - Affirmative Marketing

During FY15 the MWCD, on behalf of the town, conducted a lottery to select the three households to participate in the Community Preservation Act-funded first time homebuyers program. The MWCD conducted affirmative marketing in accordance with state and federal affordable housing regulations as required.

There are two major barriers to affirmative marketing and outreach to minority and women-owned businesses: the lack of affordable housing development opportunities and the lack of funding. With more housing opportunities and funds, the Town would be able to undertake more projects and therefore could reach out to minority and women-owned businesses.

Part A4. Assessment of Goals and Objectives - Impediments to Fair Housing

Belmont's *Analysis of Impediments to Fair Housing Choice* revealed the following impediments: discrimination, physical constraints (lack of land and existing housing), policies, lead paint and other hazardous materials, and lack of funding.

Actions taken during FY15 to overcome these impediments include the following items previously referenced:

- The Planning Board granted a Special Permit for a mixed-use development in Cushing Square, known as Cushing Village, will include twelve affordable rental units.
- Town staff continued to work through the process of developing a Housing Production Plan. A component of this Plan is the identification of potential affordable housing opportunities within Belmont.
- The Trust began to implement a first-time homebuyers program. Three families were chosen: one family for a one-bedroom unit and two families for two-bedroom units. The chosen families now have 6 months to find a suitable dwelling unit to purchase.
- Belmont Housing Authority staff secured a second Community Preservation Act grant to upgrade the electrical service at Belmont Village.
- The Town issued a Building Permit for the construction of 298 apartments (25% affordable) permitted under a Comprehensive Permit granted in 2007.

The underlying hurdles facing the development of affordable housing continued to be the residents' perception of affordable housing, its occupants, and why it is needed, as well as concerns about the costs borne by the Town to build more affordable housing (especially family housing). Often, residents have a short-term view of housing in which the home is continuously occupied by a family with school-aged children. The real estate taxes typically generated by that property do not cover the costs of Town services nor the cost of educating the children associated with such developments.

Part A5. Assessment of Goals and Objectives – Persons Living Below Poverty Level

The Town of Belmont continues to undertake the following actions that may impact the number of people living below the poverty level, many of these have been in existence for several years:

- The Trust worked with the Belmont Municipal Light Department and the Belmont Council on Aging to publicize the Earned Income Tax Credit program and offered to complete income-eligible residents' income tax returns for free.
- The Town, through its Council on Aging, offers elderly homeowners a Property Tax Work-Off Program. The Program allows participants to reduce their property taxes up to \$1,000 by "volunteering" a number of hours to the Town based on the current minimum wage.
- A variety of exemptions are available to reduce property tax obligations for certain qualifying taxpayers, including elderly persons, blind persons, disabled veterans, surviving spouse or orphaned minor child, widow or orphaned minor of police officer or fire fighter, and extreme hardship.
- The Belmont Food Pantry was established almost twenty years ago to serve Belmont residents. The Pantry is operated by volunteers and is fully supported by private donations from Belmont residents, clubs, schools, and religious organizations.
- The Belmont Affordable Shelter Fund (BASF) continues to leverage approximately \$15,000 in local funds. BASF provides stopgap funding to pay rent and utility bills while someone who was recently laid off searches for work or recovers from a long-term illness. Funds from BASF are not intended to supplement a household's income, but are meant to help maintain housing while the household gets their feet back under them.

The major barrier to reduce the number of persons living below the poverty level is the lack of funding. Although Belmont is not faced with a significant number of people living below the poverty level, the number has not yet rebounded to pre-Great Recession rates. The 2007-2009 American Community Survey (ACS) 3-Year Estimate (as provided by the US Census) reported that in Belmont 2.9% of families and 3.8% of individuals lived below the poverty level. The 2013 ACS estimate reported that in Belmont 4.3% of families and 5.6% of individuals lived below the poverty level.

Part A6. Assessment of Goals and Objectives - Energy Star Units

No HOME units are under construction within the Town of Belmont. It is anticipated that the units created in Cushing Village, the Belmont Uplands, and the three first-time homebuyer units will qualify to be Energy Star-rated.

Part B. Leveraging

Since there were no HOME projects under consideration or construction, no funds were leveraged.

The Belmont Affordable Shelter Fund (BASF), as previously mentioned, continues to leverage approximately \$15,000 in local funds.

Part C. Citizen Participation, Institutional Structure, Distribution of Expenditures

MWCD continued to provide staff support to participating communities, including Belmont, to look for opportunities within each community to develop affordable housing. MWCD is tasked with doing the administrative necessary to get a project up and running.

The Town staff continued to work through the process of developing a Housing Production Plan. Outreach and communication with the residents of the Town comprise a significant component of this Plan. MWCD will continue to be responsible for the development of the Plan in FY16.

The Trust continued to work with the Belmont Municipal Light Department and the Belmont Council on Aging to publicize the Earned Income Tax Credit program and offered to complete income eligible residents' tax returns for free. While this is not a program funded by the Town, publicizing it greatly expanded people's knowledge of the existence of the program.

The Office of Community Development, which includes that Planning Division (the Town department responsible for administering the Town's HOME program), recently completed a re-organization. Responsibilities were redistributed amongst the remaining staff and the Planning Division was again able to devote time to administering the HOME program, which had been lacking since 2013 when the Planning and Economic Development Manager retired.

Part D. Monitoring

The Town of Belmont is required to annually monitor the Waverley Woods development, which contains 11 HOME-assisted units.

With the reorganization of the department, the Town began to catch up on its monitoring responsibilities. Fortunately, because of the various state and federal affordable housing funding programs utilized to develop Waverley Woods, the Town expects this development to comply with the HOME regulations once monitoring is completed in FY16.

Part E. Displacement and Relocation

None of the activities conducted by the Town of Belmont during FY15 caused the displacement or required the relocation of any people or businesses.

Part F. Status of Loans

Previously, the Town provided a total of \$600,000 in HOME funds (FY07 - \$200,000; FY08, FY09, FY10, and FY11 - \$100,000/year) to the developer of Waverley Woods, Affirmative Investments. With the final payment of \$100,000 in FY11, the Town finished its commitment to Waverley Woods. The HOME assistance is structured as a loan to be forgiven if the developer satisfies the terms of the agreement, which includes the construction of 40 units of affordable rental housing. The developer fulfilled his obligation and the loan therefore was forgiven.

Part G. Annual Performance Report

Project	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
There were no active projects in FY15			

Minority Owned Businesses, Women Owned Businesses (compared to Male Owned Businesses), and Minority Owners of Rental Property

The Town of Belmont did not write any contracts for HOME projects during FY15.

TOWN OF BROOKLINE

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES - OVERALL

While the Town's affordable housing goals are broad, its achievements in any particular year depend upon the opportunities that it has created and cultivated during previous years, as well as market opportunities. This year, the Town was successful in advancing the Brookline Housing Authority's project at 86 Dummer Street containing 32 units of housing; closing on construction financing and beginning construction on Pine Street Inn's Beals Street Project containing 31 units of enhanced SRO housing for extremely low-income households; and investing in the preservation of affordable housing units owned by the Brookline Housing Authority. HOME, CDBG, and Housing Trust funds were used in the first two projects, while CDBG funds were used to support the third project.

Priority #1: Housing needs of single-person renters with incomes between 0 and 30 percent or 31 and 50 percent of AMI.

The Town has continued to promote the preservation of existing nonprofit-owned affordable housing serving single persons, including the disabled.

For nearly a decade, Brookline has worked with Pine Street Inn (PSI) on strategies to improve and preserve two lodging houses located at 51-53 and 55-57 Beals Street. These long-term lodging houses have been managed by PSI under lease with the owner since 2004. PSI is redeveloping the buildings into 31 "enhanced" single room occupancy (SRO) units with small bathrooms and mini-kitchenettes. Tenants will be extremely low-income single persons, many of them formerly homeless.

In early FY14 the Town financed 50 percent, or almost \$1.3 million, of the acquisition cost for the project. Half of that amount came from FY13 and FY14 CDBG funds and the other half from the Town's Affordable Housing Trust. PSI also received substantial subsidies through the Commonwealth of Massachusetts for low income housing tax credits and additional gap subsidies, as well as from the Federal Home Loan Bank of Boston's Affordable Housing Program.

In FY15, PSI bid the project and found that construction costs were significantly higher than the original budget. After several rounds of value engineering, the Town committed an additional \$650,000 to cover the remaining funding gap, including \$273,500 from CDBG Funds, \$206,100 in Brookline Housing Trust Funds, and \$170,400 in HOME funds. The project closed on construction financing and began construction in late FY15. The project will be phased to allow one building to be fully renovated, while the other building remains occupied with current tenants. It is estimated that the redevelopment of both buildings will take approximately 12 months and be completed in FY16, most likely May of 2016.

Priority #2: Housing needs of small and large family renters with incomes between 0 and 30 percent, 30 and 50 percent, or 51 and 80 percent of AMI.

One of the Town's top priorities during FY15 continues to be a project under development by the Brookline Housing Authority (BHA). The Town committed a total of \$1,712,102 in HOME funds and \$1.98 million in Housing Trust funds to the project, which closed on financing and began construction in July of 2014. The development is designed to serve ten households with incomes under 30 percent

of AMI, ten additional households with incomes less than 50 percent of AMI, and twelve additional households with incomes under 60 percent of AMI, in one-, two- and three-bedroom units. The BHA has also received more than \$7.3 million from the Commonwealth of Massachusetts for low income housing tax credits, as well as three state programs totaling over \$1.9 million. It has also raised \$300,000 from the Federal Home Loan Bank of Boston's Affordable Housing Program and \$400,000 from the HomeFunders program. Construction is anticipated to be complete by the end of 2015.

The Town also serves income-qualified renters by working with developers of rental properties obligated to provide units under the Town's inclusionary zoning requirements or through Chapter 40B. In FY15, it worked with the developer of 45 Marion Street to complete the affirmative marketing plan for thirteen affordable units within this 65 unit 40B development. This project is expected to be completed during FY16.

Priority #3: Housing needs of small family and large family owners with incomes between 51 and 80 percent of AMI.

In FY13, Brookline completed its Olmsted Hill project which contains 24 affordable two- and three-bedroom units which were sold to buyers with long-term deed restrictions. This was the last major homeownership project to be undertaken by the Town.

In FY14, four homebuyer units were created via the Town's inclusionary zoning by-law and Housing Division staff was actively involved in affirmative marketing and holding a lottery to select income-eligible buyers for those units.

As owners of existing affordable units decide to sell, Housing Division staff manages the resale process including identifying new eligible buyers through affirmative marketing and lottery. In FY15, Housing Division staff was involved in the resale of six affordable units.

Priority #4: Housing needs of single-person, small family, and large-family homebuyers with incomes between 51 and 80 percent of AMI.

The Town serves income-qualified homebuyers by working with developers obligated to provide units under the Town's inclusionary zoning requirements, and by facilitating the resale of existing affordable deed-restricted homes through the exercise of the Town's right of first refusal. In FY14, the Town worked with the developer of a twenty unit condominium at 321 Hammond Pond Parkway, to market four affordable units – three serving families with incomes below 80 percent of AMI – that closed in the fall of 2013.

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME Funds expended in FY15	Project Status
86 Dummer Street	\$16,306,590	\$1,712,102	10	32 10 < 30% AMI 10 < 50% AMI 12 < 60% AMI	1,640,651	Project construction loan closed 7/7/2014. Construction began July 2014. Completion and occupancy expected Fall 2015.
53-57 Beals Street	\$9,109,343	\$170,400	31	31	\$0	Project construction loan closed in April of 2015. Construction began immediately. Completion of 1st building expected 10/15 and 2nd building 5/16.

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES - PUBLIC HOUSING

Brookline continues to be strongly committed to preserving its low-income affordable housing stock owned by the BHA. In FY15, the Town committed \$91,817 in CDBG funds to assist the BHA with much-needed capital improvements. The project scope included the installation of new security cameras at these developments.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES - AFFIRMATIVE MARKETING

Brookline has had a very successful record of minority response to its affordable housing lotteries, both as applicants and as finalists.

The following list details the process for affirmatively marketing new affordable units in Brookline:

- The “Equal Housing Opportunity” slogan and logo is used when advertising in newspapers and on other printed material related to outreach.
- Each application and program description includes language stating that applicant eligibility will not be based on race, color, national origin, sex, religion, familial status, or disability.
- Each application requests (but does not require) “Information for Government Monitoring Purposes” regarding the race and ethnicity of the applicant.
- Information is made available via the list below to persons in the housing market who are not likely to apply for housing without special outreach:

- Advertisements are placed for two separate weeks in the *Brookline TAB*, a local newspaper.
- Advertisements are placed in metropolitan area minority newspapers including: *The Banner*, *Sampan*, and *El Mundo*, as well as the *METRO*, a free newspaper available to commuters. These publications reach populations that otherwise might not necessarily apply for units in Town.
- A notice is sent out to the Town's email notification list, which now reaches over 3,000 subscribers, including persons from all over the metropolitan area. The Division uses all newspaper ads for specific programs as an opportunity to promote subscription to this list.
- Notices are provided to the Town's METCO Program office, which serves families of color from the City of Boston with students who attend Brookline Schools.
- Notices are sent to all Brookline schools and school personnel.
- Information and applications are posted on the Town's website, and by personal notice through the Town's affordable housing listserv (subscription to which is widely publicized on the Town's website and in Town advertisements for all affordable housing opportunities).
- Information is posted at public libraries and on community bulletin boards throughout town.
- Notices are sent to all Town Departments, including the Commission for the Disabled, Veterans Affairs, Council on Aging, Health, Police, Fire, etc.
- Information is provided to the Brookline Housing Authority and applications are available at its offices, including the Section 8 office which, when appropriate, notifies Section 8 certificate holders looking for housing.
- Applications are made available via mail, at public locations including the Town Hall Planning Department and public libraries, via e-mail, and via download from the Town's web site.
- All locations for interviewing and orientation are wheelchair accessible.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES - IMPEDIMENTS TO FAIR HOUSING

In FY15, the Town worked with the WestMetro HOME Consortium to develop a Regional Analysis of Impediments to Fair Housing Choice. The Plan was adopted and submitted to HUD for final approval and contains specific action steps that consortium communities will undertake over the next five years to increase fair housing choices for members of protected classes and to battle housing discrimination.

In FY15, the Human Relations/Human Services Division reorganized itself into the new Diversity, Inclusion and Community Relations Department. Part of its charge will be to promote fair housing through educational forums for residents as well as housing stakeholders such as landlords, real estate professionals, property management companies, and tenants. The Diversity, Inclusion and Community Relations Department also manages the Town's procedures for residents wishing to file a discrimination complaint against a Brookline landlord or business. The Town's website now includes a Discrimination Report Form as well as a detailed description of the Brookline Citizen Discrimination Inquiry Procedure. Formal steps for persons who file a complaint with the Commission include: 1) meeting with Human Relations staff and follow-up with landlord or business to resolve the issue, 2) filing a formal complaint with the State Attorney General's office and/or the Massachusetts

Commission Against Discrimination, and 3) meeting with the Human Relations Commission who may assist with remedying the problem.

Service providers continue to express a need for increased supportive housing for persons with mental and sometimes physical disabilities. Housing opportunities for persons living on Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) are very limited. In order to address this impediment, the Town continues to seek opportunities to work with service-oriented nonprofits to create new opportunities that provide housing with both supportive services as well as wheelchair-accessible living space. In FY15, the Town continued to work with Pine Street Inn (PSI) to redevelop two existing lodging houses into 31 “enhanced” SRO units serving extremely low-income households. At least two of these units will be wheelchair accessible, and many will serve adults with disabilities on SSI and SSDI.

With regard to increasing housing opportunities for person with physical disabilities, in FY15, the Town continued to work with the Brookline Housing Authority on its 86 Dummer Street project which will contain a total of three units for persons with disabilities and/or mobility impairments. These units will serve persons earning below 30 percent of area median income.

Finally, the Town continues to aggressively market its new affordable housing opportunities to households least likely to apply. The steps taken and the Town’s most recent results are described in Part A3, above.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES - PERSONS LIVING BELOW POVERTY LEVEL

One of the most challenging issues facing households living below the poverty line in Brookline is the high cost of rental housing. Brookline continues to work to provide housing opportunities for very low-income households earning less than 30 percent of area median income. In FY15, the Town used CDBG funding to support capital improvements at properties owned by the Brookline Housing Authority. The Town also supported the BHA as it advanced in the creation of 32 new low-income rental units, ten of which will serve very low-income persons (< 30% of AMI). In addition, the Beals Street project will provide 31 units of rental housing serving individuals earning below 30 percent of the area median income.

In addition, the Town supports a number of programs aimed at very low-income households through its CDBG program. These programs include the Family Learning Centers, the Brookline Learning Project, The Parent Child Home Program, the Brookline Community Mental Health Center and others.

The Brookline Commission for Women, which operates with a mission to promote the cultural, racial, and economic diversity of Brookline, holds a Winter Clothing Drive for Dress for Success, a not-for-profit organization that offers services and supplies to underprivileged women entering the workforce. Additionally, the commission has worked with the Jennifer A. Lynch Committee Against Domestic Violence to sponsor the Making Cent\$ of Money series of money management seminars for Women.

Finally, the Town’s award-winning “Steps to Success” program, with a mission to pursue, “an end to generational poverty, one student at a time,” encourages school success and college completion. As the program model, which assists low-income public school students, seeks to engage parents, the program has responded to language barriers and involvement by adding English language classes for

parents. As a logical next step, the Steps to Success program employed a resources and referral counselor, who connects adults with jobs, job training, and continuing education.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES - ENERGY STAR UNITS

Both the 32 units at 86 Dummer Street as well as the 31 units on Beals Street will be Energy Star certified.

PART B. LEVERAGING

The 86 Dummer Street project has leveraged significant resources. The Town has committed a total of \$1,712,102 in HOME funding in addition to \$1,981,355 in Housing Trust and \$600,000 in CDBG funding. The project’s total development cost is \$16,306,590.

Similarly the project at 53-57 Beals Street has also leveraged significant resources. For this project, the Town has committed a total of \$170,400 in HOME funding in addition to \$829,234 in Housing Trust and \$939,286 in CDBG funding. The project’s total development cost is \$9,003,513.

The following shows funds committed for the 86 Dummer Street and 53-57 Beals Street beyond the committed Consortium HOME Funds:

Category	Amount	Source
Additional HUD Grant(s) Leveraged	\$1,539,286	CDBG
Additional Federal Funds Leveraged	\$10,604,356	Low Income Housing Tax Credit Equity
Additional State Funds Leveraged	\$1,050,000	- Mass. Housing Stabilization Program
	\$1,950,000	- Mass. Affordable Housing Trust
	\$404,903	- Mass. Community Based Housing Program
	\$500,000	-Mass. HOME
	\$1,000,000	-Mass. Housing Innovations Fund
	\$296,000	- Mass. Tax Credit Equity
Locally Leveraged Funds	\$2,810,589	Brookline Housing Trust
Other	\$800,000	- Federal Home Loan Bank Direct Grant
	\$293,797	- Developer Equity
	\$2,284,500	- Other Permanent Debt
TOTAL>>>	\$23,533,431	

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

The Housing Division works closely with a number of other Town departments, commissions, and nonprofit organizations to achieve its goal of safe and affordable housing. Coordination among groups is strong and the relationship is collaborative, and as most of the parties themselves are responsive to the public, the relationship among groups enhances opportunities for public participation and input. The following describes the institutional structure in FY15:

- The **Housing Advisory Board (HAB)**, responsible for advising the Board of Selectmen and recommending policies and programs related to affordable housing, continued to meet on a regular basis to review affordable housing initiatives. They also make recommendations regarding appropriations of Town-controlled resources for affordable housing to the Board of Selectmen. Institutional coordination is enhanced by having a representative of the Brookline Housing Authority and of the Planning Board sit on the seven-member HAB. Individual members represent the HAB in community planning processes relating to specific sites. The Housing Advisory Board takes up the Annual Action Plan and amendments thereto at its public meetings. The agendas for all meeting are publicly noticed, providing the public the opportunity to observe and comment.
- The **Brookline Housing Authority** added internal expertise in housing development in order to take a stronger role in affordable housing development. It is currently working to add 32 units at 86 Dummer Street and working on a portion of its Trustman Apartment project site. The BHA is considering how to increase utilization of other existing sites. The BHA regularly receives CDBG funding from the Town for capital improvements.
- The **Brookline Improvement Coalition, Inc. (BIC)**, previously certified as the Town's CHDO, owns two affordable rental housing projects and seeks other opportunities for small-scale affordable housing creation.
- The **Diversity, Inclusion, and Community Relations Department** works to increase diversity and awareness of fair housing issues in the Town. The Commission is the primary department responsible for providing public education on Fair Housing and processing complaints on housing discrimination from local residents.
- The **Brookline Community Mental Health Center (BCMHC)** continues to be the lead agency in implementing the Town's Homelessness Prevention Programs. In addition, the Center administers the Brookline Safety Net, supported by the Brookline Community Foundation, which provides emergency funds critical to keeping low-income residents in crisis housed.
- The **Brookline Council on Aging and Brookline Community Aging Network (B-CAN)** continue to work with Brookline seniors to identify appropriate housing opportunities and supportive social services, collaborating with the Housing Division on areas of mutual concern. The Housing Advisory Board has collaborated with these groups to identify senior housing opportunities.
- The **Brookline Health Department** continues to enforce health and sanitary code issues related to the Town's housing stock as well as lead paint assessments, inspections, screening programs, and the enforcement of lead paint abatement. The Health Department also works with the Housing Division to implement the Town's Homelessness Prevention and Rapid Re-Housing Program, focusing primarily on currently homeless or near-homeless households.

- The **Board of Selectmen** meets weekly, holds public hearings, invites citizen input, votes on the CDBG One Year Action Plan and any amendments to that Plan, and considers the recommendations of an ad hoc CDBG committee. The Selectmen also vote on allocations of the Brookline Housing Trust and on any amendments to Brookline’s HOME One Year Action Plan. Votes on CDBG and HOME are noticed at least 10 days in advance in the legal ads in the local Brookline TAB, as well as at least 48 hours’ notice in the Selectmen’s published agendas, and include a 30-day comment period. Individual Selectmen also may take leadership positions in the planning for any particular project or initiative, such as Olmsted Hill and recent zoning and/or licensing changes permitting enhanced single-room occupancy units in affordable, deed-restricted lodging houses.

PART D. MONITORING

The results of the most recent on-site Housing Quality Standard (HQS) inspections of HOME rental projects are listed in the following table. Since all of the HOME-funded projects in Brookline have fewer than 25 units, an on-site inspection is required only every two years and took place in FY15. Tenant re-certifications are done on an annual basis and took place in FY15.

On-site Inspection Results

Project	Date Monitored	Compliance with HQS	Compliance with Income Requirements
1017 Beacon Street	05/15	Yes	Yes
1027 Beacon Street	05/15	Yes	Yes
1754 Beacon Street	05/15	Yes	Yes

Additionally, all homeowners who have received financial assistance through the Homebuyer Assistance program (or have deed restrictions under other Town-sponsored programs) are monitored on an annual basis to verify continued owner occupancy. The Brookline homebuyer programs require that all units purchased with HOME funds remain buyer-occupied throughout the term of the mortgage. Each buyer is contacted by certified mail with a return receipt request. The owner must sign and return an enclosed certification that s/he still occupies the unit as his/her primary residence and that s/he is in compliance with all terms, conditions, and requirements set forth in the mortgage and promissory note.

Owner occupancy is also confirmed through Assessor’s Office determination that the owner continues to qualify for the Town’s residential exemption, and through review of annual Town-generated street listings. If any unit is found to be out of compliance, the Housing Division staff will work with Town Counsel to initiate foreclosure and recapture of the unit. All current participants continue to comply with the requirements under program regulations.

PART E. DISPLACEMENT AND RELOCATION:

The Dummer Street Project is new construction and did not result in displacement of any tenants.

The Beals Street project is an acquisition and rehabilitation project with buildings containing existing tenants. The project has followed strict URLA Guidelines for managing temporary and permanent relocation and is being monitored by the Massachusetts Department of Housing and Community Development’s Bureau of Relocation. All income qualified tenants will be allowed to return to the property, once construction is complete. Non-qualified tenants will be offered permanent relocation following URLA Guidelines. Because of project phasing, it is expected that no tenant will need to be out of their unit for more than 7-8 months.

PART F. STATUS OF LOANS

HOME Loans Currently Outstanding	55 properties
	52 homeownership properties
	3 rental properties
HOME Principal Balances Owed:	\$8,552,516.33
	\$5,132,275.33 (homeownership units including ADDI)
	\$1,537,739 (3 rental properties)
	\$1,882,502 (2 projects under construction – Dummer St. and Beals St.)
HOME Loans Deferred:	57
Terms of Deferral:	30 years, extendable
Loans Defaulted:	0
Balances Forgiven/Written Off:	0

PART G. ANNUAL PERFORMANCE REPORT:

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
86 Dummer Street* (HOME funded)			
Renter households	22	10	32*
Owner households	0	0	0
51-57 Beals Street (CDBG funded)			
Renter households	31	0	31*
Owner households	0	0	0
*Project currently underway and will be completed in FY16			

In FY15, the Brookline Housing Authority and its contractor, Colantonio, worked to achieve over \$2 million in MBE/WBE contracts, which will constitute 17.24 percent of the construction cost at 86 Dummer Street. The 86 Dummer Street project was not completed in FY15, so the contracts will be counted in a future CAPER.

In FY15, Pine Street Inn and its Contractor, Seaver Construction, had identified 12 percent of the contracts for MBE/WBE companies. The Beals Street project was not completed in FY15, so the contracts will be counted in a future CAPER.

TOWN OF CONCORD

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES

Priority #1: Housing needs of small family homeowners with incomes between 80-120 percent of AMI.

Objective: Improve access to affordable owner housing.

Strategy: Concord used its HOME funds to renew its membership in the Regional Housing Services Office (RHSO), which provides professional housing staff to help increase the visibility of Concord's affordable housing opportunities. RHSO Staff assisted Concord's homebuyer program by providing resale assistance with existing affordable housing units, providing homeownership seminars for new and existing affordable unit residents, and monitoring Concord's homeownership program. They also provided additional services on an as-needed basis, including qualifying potential homebuyers and assisting them in the purchasing process, as well as assisting in the development of lottery and marketing programs for new units. In addition, RHSO staff has continued to assist the Town in administering the Concord Housing Development Corporation's Small Grant program that provides funding for life-safety, accessibility, and needed repairs for income eligible households.

Accomplishments: The number of middle-income homeowners assisted with HOME funds in identifying and purchasing a first home or making needed improvements to an existing home.

Quantity: 4

Obstacles to meeting unmet need: Assisting middle-income small family households in taking advantage of homeownership or home improvement opportunities is dependent on the availability of income-eligible units, households that meet the necessary income requirements, and sufficient program funding.

Priority #2: Housing needs of the small family renters with incomes between 51-80 percent of AMI.

Objective: Improve access to affordable rental housing.

Strategy: In order to preserve and improve the quality of its existing affordable rental housing units, Concord is using HOME funds to provide assistance and funding to the Concord Housing Authority (CHA) to make needed repairs to affordable rental housing sites and individual units.

Accomplishment: The number of low-income individuals provided with repaired and/or improved affordable units through the assistance of HOME funds. Quantity: 4

Obstacles to meeting unmet need: Assisting low-income small family households in accessing affordable rental housing is dependent on the availability of income eligible units, the number of low-income households, and sufficient program funds. The number of units is further affected by the amount of work necessary for each unit assisted.

Priority #3: Housing needs of homeowners with incomes between 80 and 100 percent of AMI.

Objective: Increase range of housing options and related services for persons with special needs.

Strategy: With the assistance of HOME-funded RHSO staff, administered the Concord Housing Development Corporation's Small Grant program to enable elderly individuals, or those with special needs, to make alterations and/or repairs to their homes which allowed them to remain in residence.

Accomplishment: The number of elderly individuals assisted with HOME funds to complete required repairs or improvements made to their home, which allowed them to remain in residence. Quantity: 4

Obstacles to meeting unmet need: Assisting moderate-income individuals to remain in their existing homes is dependent on the number of individuals who are interested in receiving funding and meet the eligibility requirements.

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES - PUBLIC HOUSING

The Town of Concord is actively working with the Concord Housing Authority (CHA) to provide HOME funding to improve existing public housing units and develop new units on an existing site. Concord officially joined the WestMetro HOME Consortium in 2010 and established its opening priorities for the program in the FY11 Annual Action Plan. Last year, Concord entered into an agreement with the CHA to use three years of its HOME funding allocation and HOME funds borrowed from the Town of Lexington to make accessibility improvements and other repairs to a four-unit development in Concord Center. HOME funds in the amount of \$115,000 were committed in August 2014, of which, \$5,000 was spent in FY14 and \$12,267 in FY15. The project will go out to bid in the fall (2015) with construction to follow over the winter.

Over the last year, the WestMetro Housing Consortium moved to a funding pool model that provides unused funding to projects which apply for those funds. Concord submitted a funding application for the first round of this funding pool and was approved to use HOME funds to assist the CHA in completing four new units, one of which will be fully accessible at the Peter Bulkeley Terrace Senior Housing development. The HOME funds will be combined with State, Community Preservation Act, and other Town funds to complete the necessary work. Concord has completed the review and approval process, and is currently processing closing materials in order to commit the funds by September 2015.

The Town of Concord has an excellent working relationship with the CHA, which oversees many of the community's affordable housing rental units. The Town regularly refers individuals interested in affordable housing to the CHA, and continues to provide an educational and marketing role for the CHA whenever possible. Concord's Town Meeting has awarded almost \$1.5 million dollars in Community Preservation Act funds to the CHA in recent years to convert an under-subscribed congregate-style senior housing facility into 28 individual rental units affordable to elderly individuals and persons with disabilities and to complete necessary roofing repairs at the 20-unit Everett Garden Expansion site. As noted above, the Town is currently working with the CHA on HOME projects to make improvements on four existing units and to develop four new units at existing CHA rental properties.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES- AFFIRMATIVE MARKETING

The Town of Concord worked with the CHA to develop and implement an affirmative marketing plan which meets all requirements for these projects.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES- IMPEDIMENTS TO FAIR HOUSING

In 2013, Concord completed its first *Analysis of Impediments to Fair Housing Choice* (AI) which provided the Town with a better understanding of the existing impediments to fair housing and how they may be addressed. Concord's AI recognized a number of existing impediments including the lack of available land suitable for affordable housing; zoning, land use, and building policies which promote single-family homes over multifamily developments; sewer and other infrastructure limitations which further limit the locations for future developments; and, a lack of educational materials and programs available in different languages to assist minority households. The AI provides a framework for making Concord a more inclusive community by including actions to address each of these impediments such as:

- Working with State and local organizations to identify unused parcels which can be developed into affordable housing (Concord is actively working with the Concord Housing Development Corporation to develop an affordable assisted living project on former State land in West Concord);
- Using CPA, HOME, and other funding programs to assist in the creation and preservation of existing units (CPA, State, and local funds will be combined with HOME funding to develop new affordable senior housing units at the Peter Bulkeley Terrace Housing Development);
- Developing zoning and other local development incentives to promote the inclusion of affordable units in new developments (Under existing local zoning incentives, three multi-unit developments, all including new affordable units, are in various phases of construction at this time); and
- Working both locally and with State and Federal agencies to further expand Concord's infrastructure capacity.

Additionally, in FY15 Concord supported the WestMetro HOME Consortium's Regional Fair Housing Plan. Concord will complete the activities outlined in that action plan, including fair housing training sessions.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES- PERSONS LIVING BELOW POVERTY LEVEL

As reported by the 2010 U.S. Census, approximately 4% of Concord residents and 1.7% of its families live at or below the poverty level. Specifically, 2% of those 65 or older; 5.5% of those under the age of 18; and nearly 8% of single parent (female-led) households are listed as living in poverty as of 2010. The CHDC's Small Grants Program and CHA's affordable housing units are both of potential assistance to this group. In addition, Concord's Hugh Cargill Fund provides short-term emergency financial assistance and the Concord Municipal Light Plant provides utility bill assistance to low-income residents.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES - ENERGY STAR UNITS

The Town of Concord promotes Energy Star units and has approved the MA STRETCH CODE, which is intended to achieve 25% more energy efficiency in new construction. The renovations at 282-294

Thoreau Street will convert existing residential units to Energy Star units in order to meet the Town's new energy efficiency requirements.

PART B. LEVERAGING: N/A

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

The CHDC was established by the Town of Concord through Special Legislation to serve as a conduit for creating and promoting affordable housing opportunities on behalf of the Town. HOME funds may be used in the future to assist the CHDC in completing homebuyer and/or rental housing development projects for low- and moderate-income individuals by buying down or otherwise assisting with the financing and construction of those units. Additional citizen participation was also sought this year when Concord's Select Board held a public hearing on proposed changes to Concord's Annual Action Plan and to review the commitments for HOME funding of the CHA's current and upcoming projects.

Concord is constantly working to improve communication and coordination between Town departments and with private and public organizations in the community. Concord's Board of Health, Youth Services Coordinator and Community Services Coordinator continued developing new programs to better serve older adults who need additional services but do not yet qualify for assistance through Concord's Council on Aging (COA). Concord's Health Division also provides enforcement and inspection services to the Town, and assists the COA and the Concord Housing Authority when cases of hoarding are discovered.

PART D. MONITORING: N/A

PART E. DISPLACEMENT AND RELOCATION: N/A

PART F. STATUS OF LOANS

In 2015, the Town of Concord borrowed \$46,702 from the Town of Lexington's HOME funds for the purpose of completing accessibility improvements and renovations at the 282-294 Thoreau Street units owned by the Concord Housing Authority. Repayment will commence with the receipt of Concord's FY16 HOME funds.

PART G. ANNUAL PERFORMANCE REPORT

HOME funding of the renovations at 282-294 Thoreau Street housing units will impact three existing three-bedroom units and one existing six bedroom unit owned by the Concord Housing Authority. Two of these three-bedroom units are rented by the CHA and one is rented to the Minuteman Arc for Human Services. One has been designated as a high HOME unit that will be available to households at or below 60% AMI and the others will be available to households at or below 80% AMI. The six-bedroom unit is rented by Till, Inc. and serves as a group residence for developmentally disabled adults.

TOWN OF FRAMINGHAM

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES

In FY15, Framingham continued to address the Town's three housing priorities:

- **Priority 1: Housing needs of homeowners with incomes between 31 and 80 percent of AMI**
- **Priority 2: Housing needs of renters of large and small families between 0-80 percent of AMI**
- **Priority 3: Housing needs of elderly renters with incomes between 0 and 80 percent of AMI**

Priority #1: Housing needs of homeowners with incomes between 31 and 80 percent of AMI.

Homeownership/Down Payment Assistance Program:

The Town of Framingham continued to collaborate with SMOC, the non-profit who holds First Time Home Buyer classes, to market the program to potential eligible participants. While several applications were received throughout the year, only two applicants were determined eligible for the program. Ultimately, the eligible applicants withdrew from consideration prior to being selected. The Town will continue to work with SMOC to market the program to potential participants.

Housing Rehabilitation Assistance Program:

The FY15 HOME Rehabilitation program had two cases. The rehabilitation of both cases was completed, but one case is still open for review. The households were between 31-50% AMI, both were elderly and one received hoarding assistance services.

In November 2014, the Community Development Department lost its Housing Quality Inspector which required queued cases to be placed on a temporary hold. The Housing Quality Inspector also served as the Code Enforcement Inspector for the Neighborhood Improvement Program, an interdisciplinary code enforcement task force that focuses on addressing code violations in our targeted neighborhoods. Since his departure, the Community Development Administrator has joined the Neighborhood Task Force, and continues to send out CDBG and HOME Housing Rehabilitation Program Information, including the code violation letters.

Priority #2: Housing needs of renters of large and small families between 0-80 percent of AMI

CHDO/ 117 Second Street:

In FY14, funds were provided to the Framingham Development Corporation (FDC), The Town's designated Community Development Housing Organization (CHDO), for the purchase and rehabilitation of a property located on 117 Second Street. After the contract with FDC was executed, the new HOME Final Rule no longer deemed the FDC as an eligible CHDO. HUD required the FDC to recertify in order to be designated as a CHDO. Their status is currently pending. The two bedroom single-family property is rented by a Section 8 household with an annual income of less than 30% AMI.

Bethany Hill School Apartments:

The Community Development Department completed the rehabilitation of the Bethany Hill School Apartments, a 40-unit subsidized housing complex owned by the Congregation of the Sisters of Saint Joseph of Boston serving families and individuals since May 2015. HOME funds were provided to

rehabilitate six units and in February 2015, the original contract of \$79,000 was amended to \$96,200 to rehabilitate an additional bedroom and kitchen. Construction was completed by June 30th and all seven apartments are rented to individuals with incomes below 80% AMI.

Priority #3: Housing needs of elderly renters with incomes between 0 and 80 percent of AMI

Tribune Apartments:

Tribune Apartments provides 53 elderly and disabled households with affordable rental housing. In FY15, HOME funds were awarded to the rehabilitation of this property located at 46 Irving Street. The project is targeted for completion in FY16. The HOME underwriting process is currently in progress.

The Office of Community Development, with the assistance of the Planning Department, continues to investigate opportunities for affordable housing for elderly renters within the Town of Framingham.

Active HOME Projects in FY15

Project Name	Budget	Contract Amount	HOME UNITS	Total Units	Funds Expended in FY15	Project Status
Bethany Hill School	\$95.2	\$95.2	7	42	\$16.2	Completed

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES – PUBLIC HOUSING

The Town continues to support the Framingham Housing Authority (FHA) in its efforts to better serve the community. The Town informs the Authority of the availability of CDBG and HOME funded activities and services in which Authority residents may participate. In addition, CDBG and HOME funds are allocated for improvements at its residential complexes.

The Town continues to investigate the possibility of using HOME funds to improve the existing public housing stock. The barriers to improvements of the current public housing stock include lack of funding.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

The Town affirmatively markets HOME opportunities for the Homebuyer Assistance and Housing Rehabilitation Assistance programs. Materials and presentation are available in English, Spanish and Portuguese. These programs are promoted to community organizations and service providers in the Town’s targeted communities.

Affirmative marketing activities included the following: public information distribution, participation in homebuyer counseling workshops (SMOC provides the First Time Homebuyer Class three times a month), and promotion to local banks and mortgage companies, and at community events with large renter population. The Community Development Administrator will undertake outreach efforts to the Brazilian and Hispanic population to further market the CDBG and HOME programs.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

Goal: Promote decent affordable housing opportunities

Objective: Increase homeownership and rental opportunities for low – and moderate- income persons, persons with disabilities, minorities, and persons with limited English proficiency.

Progress Assessment: The Town of Framingham updated its *Analysis of Impediments to Fair Housing* in April 2012. Some of the Town’s efforts to overcome the impediments to fair housing include:

- Transit Oriented Development for the Downtown
- Mixed-Use Development in the Central Business District
- Geographic De-concentration of Low- and Moderate-Income Housing
- Articulation of Comprehensive Town Housing Policy

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

The Town of Framingham, through its Community and Economic Development Department, in consultation with key housing and social service providers and the public leadership of the Town, devised a strategy that initiates actions in respect to Town-controlled resources that help reduce the number of households below poverty level. A significant element of this strategy is the encouragement by the Town for housing service providers to actively and directly link their clients to existing self-improvement and self-sufficiency programs. These programs include educational, employment, and training activities, economic development initiatives, and those supportive services, such as child care, and transportation which permit household heads to access and pursue means of self-improvement. Severe cuts in public funding resources have made it more difficult to coordinate and integrate strategies between the networks of local agencies necessary to assist with the moving out of households in poverty. Providers will strive to ameliorate poverty through interventions undertaken in as timely a manner as possible.

The town aims to increase stability for families that are self-sufficient, yet still at risk of becoming homeless. The Community Development Department will partner with the South Middlesex Opportunity Council (SMOC) to administer a TBRA Security Deposit Program that will offer income-eligible applicants a security deposit and first month’s rent. This enables low-income households the opportunity to procure permanent housing without depletion of their available savings.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS

N/A

PART B. LEVERAGING

N/A

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

As required by the U.S. Department of Housing and Urban Development (HUD), the Town of Framingham maintains a Citizen Participation Plan, which contains the Town’s policies and procedures for public involvement in the Consolidated Plan process and the uses of CDBG and HOME Funds.

The Department of Community and Economic Development will continue to work as an agent for coordination of efforts and change. Through its participation in a broad range of committees, task forces, and focus groups, such as the Fair Housing Committee, Homelessness Task Force, MetroWest Outreach Coalition (in support of homeless individuals and families housed in hotels), Framingham Downtown Renaissance, Framingham Community Partners, Community Connections, the Town Meeting Standing Committee on Planning and Zoning, and the Foreclosure Task Force. Feedback on the

effectiveness of programs that are carried out by the Town is sought and encouraged from these groups as well as more formally through the Community Development Committee, Board of Selectmen, and Town Meeting, all of whom vote on activities and services to be offered each year with CDBG and HOME funding support. The Department of Community and Economic Development will promote a housing agenda on behalf of the community. Positive change can only occur in the community over the long term. In the near term, objectives must be set to continually raise concerns, frame issues, seek forums, further debate, facilitate dialogue and educate.

PART D. MONITORING

The Community Development Program continues to utilize the *Monitoring Policies and Procedures* with an attached schedule of monitoring for CDBG and HOME funded activities. The Monitoring Policies and Procedures were required by an audit finding by the Town’s Auditor’s and HUD. HUD reviewed the policies and schedule and removed the audit finding in FY15.

Due to a lack in staff, programs have not been able to be monitored in a timely fashion. In March of 2015, an Administrative Assistant was hired by the Economic and Community Development Department and monitoring of program and projects will resume as specified in the *Monitoring Policies and Procedures*.

PART E. DISPLACEMENT AND RELOCATION

N/A

PART F. STATUS OF LOANS

HOME Loans Currently Outstanding: 9 (7 Homeowner rehabilitation assistance, 1 homeownership property and 1 rental properties).

HOME Principal Balance Owned on above loans: \$157,961.55

PART G. ANNUAL PERFORMANCE REPORT

	Very Low Income (At or below 50% AMI)	Low Income (51-80% AMI)	Total
117 Second Street	1	-	1
Renter Household	1	-	1
Owner Household	-	-	-

Minority Owned Businesses

The Town of Framingham did not write any contracts to minority owned business for HOME projects during the reporting period.

Women Owned Businesses (Compared to Male Owned Businesses)

The Town of Framingham did not write any contracts to women owned businesses for HOME projects during the reporting period.

Minority Owners of Rental Property

The Town of Framingham did not write any contracts to minority owners of rental property for HOME funds during the reporting period.

TOWN OF LEXINGTON

The Town of Lexington has an active affordable housing program, and has addressed the goals and objectives established in the FY15 Annual Action Plan. This CAPER report primarily reports on HOME-funded projects and activities, and does not cover all affordable housing initiatives in Lexington.

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES – OVERALL

Throughout FY15, Lexington made progress in meeting its HOME-specific housing goals and objectives.

Priority #1: Housing needs of small family renters with incomes between 31 and 80 percent of AMI.

Lexington is progressing in its development of a Tenant-Based Rental Assistance (TBRA) Program. This program will be the Town's HOME-funded project in FY16.

The TBRA program proposed to offer rental assistance to low- and moderate-income residents to meet their rental security deposits. The program is designed to provide federal HOME funding to assist households in obtaining and retaining permanent housing, thus helping to eliminate housing barriers. The Program will be designed to meet all HOME requirements (24 CFR 92.209), and will serve low-income (60% AMI or under) households with security deposit and first month's rent for apartments at affordable rent limits (not to exceed the Lexington Payment Standard). The program will operate on a first-come, first-served basis for as long as funding is available.

Additionally, the Town has non-HOME funded projects that contribute to the priority described above, including the Fairview project which will create 4 units of rental housing for low-income households. Other projects include Busa Farm, which began the permitting process in FY15, and a third site, Leary Land, remains in the pre-development queue. All three sites will likely be a mix of one-, two-, and three-bedroom units.

Priority #2: Housing needs of renters and owners earning at or below 80 percent of AMI.

Through its role as a member of the Regional Housing Services Office (RHSO), the WestMetro HOME Consortium, and Metro West Collaborative Development CHDO, the Town believes that it is meeting the responsibilities of this objective. While there is always more to do, the Town completed its Housing Production Plan (HPP), which has a strong focus on the housing needs of the community at-large and of those households earning below 80 percent AMI, in particular.

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES – PUBLIC HOUSING

Like most housing authorities, Lexington's Housing Authority continued to experience high demand across all programs with waiting lists stretching multiple years in the future.

The Lexington Housing Authority continued work on two significant developments in FY15.

The first project that moved forward in FY15 was the rehabilitation of 561-563 Massachusetts Avenue, a duplex that is fully-accessible to persons with disabilities. The Mass. Ave. project is HOME-assisted to bring the building up to all current standards. This project is nearing completion. Last year in FY14,

Lexington committed \$199,000 in accumulated HOME funds towards this project. By the end of FY15, the project expended \$158,000.

The scope of this project included the replacement of the roof and furnace, renovation of the kitchens and baths, construction of a new retaining wall, repairs to paving and handicapped ramps, and substantial pruning of large trees, as well as soft costs including the architect, contingency, bidding, and overhead. As stated above, there are two units in the project. One will be leased to a HOME-eligible low-income family. The other unit will be leased to Cooperative for Human Services, Inc., an organization that runs a group home that houses three low-income individuals with disabilities.

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended to date	Project Status
561 Mass. Ave	\$198,573	\$198,573	2	2	\$157,757	In Progress

Though not HOME-funded, the second project in FY15 was an addition to the Greeley Village site of four fully-accessible units. This project is being funded by the Commonwealth (through DHCD) and the Town (through CPA funds), and construction is almost complete.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

All of Lexington’s affordable units are affirmatively marketed. The Town approves all marketing plans for developments with affordable units. A large component of the marketing plan requires the developer to specifically list all of the methods they will use to affirmatively market the units. Women-owned businesses, including attorneys and lottery agents, have been on the development teams of several projects. Lexington also follows the guidelines that require that outreach targets minorities.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

In FY15, Lexington supported the completion of the WestMetro HOME Consortium Regional Fair Housing Plan. Lexington will undertake the outlined activities in the action plan including fair housing training sessions in FY16.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

Lexington is fortunate to have few individuals and households living below the poverty level (approximately 4%, versus 11% at the State level). Census data (2010 Census and ACS Survey data reported through factfinder.census.gov) reports that poverty may disproportionately affect single-parent households (especially those led by women), households over 65 years of age, and adult individuals in unrelated households.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS

Bedford promotes Energy Star units, and has approved the MA STRETCH CODE, which is intended to achieve 25% better efficiency in all new construction projects.

PART B. LEVERAGING

The only active project, located on Mass. Ave., does not use local funds in addition to the HOME funds.

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

Lexington has developed a strong organizational structure to support the success of HOME projects and all other elements of the Town’s housing agenda. The Lexington Housing Assistance Board was created in 1983 is charged with the creation and preservation of affordable housing through the acquisition, rehabilitation, renovation, construction of property within the Town of Lexington. In addition, Lexington has adopted the Community Preservation Act, and the Lexington Town Meeting regularly appropriates funding for local affordable housing projects. Lexington has a Housing Partnership which advises the Town on affordable housing matters and Lexington is a member of the Regional Housing Services Office which supports efforts for the Town. The current HOME project is the rehabilitation of a state-financed public housing duplex owned by the Lexington Housing Authority.

PART D. MONITORING

In May of 2013, the Consortium conducted an in-depth monitoring review of Supportive Living’s Douglas House project. This property consists of 15 one-bedroom units, 11 of which are HOME-assisted. Through this review, the site met all requirements of the HOME regulations.

PART E. DISPLACEMENT AND RELOCATION

N/A

PART F. STATUS OF LOANS

There were no new HOME loans granted in FY15.

PART G. ANNUAL PERFORMANCE REPORT: N/A

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
561-563 Mass. Ave.*			
Renter households	2*	--	2
Owner households	--	--	--
*Project currently underway and will be completed in FY16			

Minority Owned Businesses						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non- Hispanic	Hispanic	White non- Hispanic
Number of contracts	2	--	--	--	--	2
Dollar amount of contracts	\$159,800	--	--	--	--	2
Number of sub-contracts	--	--	--	--	--	--
Dollar Amount of sub-contracts	--	--	--	--	--	--

Women Owned Businesses (compared to Male Owned Businesses)			
	Total	Women Owned	Men Owned
Number of contracts	2	--	2
Dollar amount of contracts	\$159,800	--	2
Number of sub-contracts	--	--	--
Dollar Amount of sub-contracts	--	--	--

TOWN OF NATICK

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES - OVERALL

Priority #1: Housing needs of single persons owners with incomes between 51 and 80 percent of AMI.

In its on-going positive relationship with the Natick Housing Authority (NHA), the Natick Affordable Housing Trust, which manages the Natick HOME Funds, is continuing the shared mission to use HOME funds to leverage other funding to fix and bring back online any existing vacant Housing Authority residential units before seeking to build new units. Several years ago the Trust partnered with the NHA in providing \$90,000 in HOME funds to rehabilitate two vacant and under-utilized units at a NHA owned development called Cedar Gardens, and converted these two units to accessible ADA compliant rental units for the elderly. This year the Affordable Housing Trust has committed \$166,350.00 in HOME Funds to the rehabilitation of the vacant and neglected historic Coolidge House in Natick Center. The Coolidge House is a “congregate” with eighteen (18) Single Room Occupancy (SRO) units that has stood vacant for years. The deferred maintenance has been taking its toll on the condition of the building and any potential usability in the future. Because of the successful completion of the Cedar Gardens project, the Department of Housing and Community Development (DHCD) recently provided the balance of the rehab construction costs, a sum of \$638,645 in “matching” funds in converting the eighteen (18) SRO units into ten (10) one-bedroom affordable units for use by income qualified young adults. The NHA will lease the property to the Department of Mental Health (DMH) to house clients, and provide community space for group activities, and staff offices as part of their Community Based Flexible Supports program.

Priority #2: Housing needs of small family owners with incomes between 51 and 80 percent of AMI.

The Natick Affordable Housing Trust is also working with the NHA to bring back online a two-family house at 6 Plain Street that has stood vacant for 14 years, since 2001. Because of inadequate funding from both the NHA and Natick’s available HOME funds, this project has been on Natick’s priority list for rehabilitation since 2009 and a Natick HOME Budget item since 2011. Recently DHCD awarded the NHA the sum of \$330,000 in High Leverage Asset Preservation Program (HILAPP) funding, based on the HOME commitment of \$125,000, to provide the balance needed to completely rehabilitate the building and provide much needed affordable housing, with a yard, for income qualified families. DHCD expressed the matching funds for these two projects would not be possible without the Natick Affordable Housing Trust’s commitment of HOME funds, and the good working relationship that has been established between the Town and the NHA.

Priority #3: Housing needs of elderly owners with incomes between 50 and 80 percent of AMI.

The Natick Affordable Housing Trust has been investigating various means to assist those elderly who are income qualified and in need of affordable housing. One option that has been more extensively reviewed was the implementation of a Tenant Based Rental Assistance (TBRA) program. This program would be setup to assist elderly in keeping their existing residences, and living in their regular place of residence as long as possible while aging in place. The program would provide gap funding between the yearly increase in rents of market and affordable rental units and the elderly applicants fixed income. The guidelines for this program have not yet been developed.

HOME Projects Active in FY15

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended in FY15	Project Status
Cedar Gardens	\$128,350 (\$90,000 HOME)	\$90,000	7	260	0	Occupied
Coolidge House	\$684,777 (\$166,350 HOME)	\$166,350	5	10	0	Design/Engineering /Construction Drawings
6 Plain Street	\$394,269 (\$125,000 HOME)	\$125,000	1	2	0	Design/Engineering /Construction Drawings

Number and Types of Households Assisted with HOME funds

	Ext. Low Income	Low Income	Moderate Income	Total
Cedar Gardens				
Renter households	0	2	5	7
Owner households	-	-	-	-
Coolidge House				
Renter households	0	5	0	5
Owner households	-	-	-	-
6 Plain Street				
Renter households	0	2	0	2
Owner households	-	-	-	-

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES - PUBLIC HOUSING

The Town of Natick, through its Affordable Housing Trust, coordinated with the Natick Housing Authority (NHA) in committing \$166,350.00 in HOME Funds to the rehabilitation of the Coolidge House in Natick Center. The Coolidge House is a “congregate” with eighteen (18) Single Room Occupancy (SRO) units to be converted to ten (10) one-bedroom affordable rental units. Because of that funding, the Department of Housing and Community Development (DHCD) provided the balance of the construction costs, a sum of \$638,645 in “matching” funds. The Natick Affordable Housing Trust is also working with the NHA to rehabilitate a two-family house at 6 Plain Street. Again, because of the \$125,000 in HOME funding committed, DHCD awarded the NHA \$330,000 in High Leverage Asset Preservation Program (HILAPP) funding to provide the balance of construction costs.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES - AFFIRMATIVE MARKETING

Natick continues to require affirmative marketing for all affordable housing units for sale or rent in Natick, through a Regulatory Agreement with developers. Any resale affordable units have and will continue to be affirmatively marketed. All contract opportunities that become available through the Town of Natick are advertised to local, as well as women and minority-owned businesses.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES - IMPEDIMENTS TO FAIR HOUSING

The Town of Natick completed their five-year *Analysis of Impediments and Fair Housing Plan* in 2012, which resulted in the development of several actions which are being addressed as resources become available:

- Action 1: Continue to provide and enhance an outreach program for landlords, real estate professionals, and tenants to ensure compliance with fair housing requirements and an understanding of the penalties for violations.
- Action 2: Continue to provide more resources towards the Fair Housing Information Program.
- Action 3: Provide more proactive outreach to facilitate complaints to the Massachusetts Commission Against Discrimination (MCAD), i.e. Pair Testing.
- Action 4: Participate more actively with the City of Newton and other HOME Consortium members on Fair Housing programs.
- Action 5: Continue to provide more education on non-profit programs in home improvement and homebuyer counseling.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES - PERSONS LIVING BELOW POVERTY LEVEL

The Natick Affordable Housing Trust developed a one-night homeless voucher program using trust funds in conjunction with the Natick Police Department. This program provides emergency assistance to the homeless. The program releases one voucher, or several over the weekend or holiday, to a recipient who is then required to meet with the Natick Human Services Department for further assistance. The program has assisted several individuals and families over the last two years, particularly in the winter. Compared to surrounding communities, Natick is average in terms of percentage of families below the poverty level; most of the increase occurred in the last ten years. Natick had 2.4% of families below the poverty level between the years 2006 and 2010 (2006-10 ACS data), with an increase of 0.7% since 2000. This amount is approximately half of the Middlesex County average and one-third the Massachusetts average of 7.5% of all families. Since then, according to the 2008-12 ACS, family poverty in Natick has increased slightly to 2.5%, compared to 5.2% county-wide, and an increase to 7.7% statewide. Family households comprise approximately 50% of those in poverty.

Natick's Office of Human Services assists residents of all ages and incomes by providing resources that might include but are not limited to food, clothing, housing, employment, transportation, insurance, legal services, health care, medication, fuel/home energy, disability services, food stamp applications, and MassHealth applications.

Natick Service Council is an advocacy, referral, case management, and information center serving those making an income at or below the poverty level. The Service Council assists clients with basic needs for food, housing, and access to health care with the goal of promoting self-sufficiency.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES - ENERGY STAR UNITS

N/A

PART B. LEVERAGING

Category	Amount	Source
Additional HUD Grant(s) Leveraged	0	0
Additional Federal Funds Leveraged	0	0
Additional State Funds Leveraged	\$330,000	High Leverage Asset Preservation Program (HILAPP) Source: MA Department of Housing and Community Development.
Additional State Funds Leveraged	\$638,645	Special Re-Occupancy Initiative Funds, Source: MA Department of Housing and Community Development.
Locally Leveraged Funds		
Other		
TOTAL >>>>>>>>>>>>	\$968,645	

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

The Town of Natick adopted its most recent Citizen Participation Plan in 2009, which is based on the WestMetro HOME Consortium Plan. The Town meets the requirements of this plan and involves citizens in the process of developing, reviewing, and commenting on the Consolidated Plan, the Annual Action Plan, and the CAPER. The HOME funds are managed by Town Staff and approvals made by the Natick Affordable Housing Trust which meets in posted public meetings each month.

The distribution of prior fiscal year HOME funds expenditures focused around and within Natick Center. The Town made significant efforts in revitalizing the historic Natick downtown by encouraging smart growth and the development of high density residential units requiring affordable housing. The down-payment assistance program assisted first-time homebuyers in the purchase of affordable housing in two of these developments: Castle Courtyard on East Central Street and South Natick Hills on South Main Street. The recent improvements at Cedar Gardens are serving to improve the accessibility of senior citizens living in the area. All are within a one-mile radius of the MBTA Commuter Station in Natick Center which also provides a bus stop for the Metro West Regional Transit Authority system. The NHA's Coolidge House and 6 Plain Street properties mentioned earlier are additions to this record of affordable housing rehabilitated in a smart growth fashion, located just outside the Downtown Mixed Use District and within a ¼ mile from the Natick Center commuter rail station.

PART D. MONITORING

For the last two years, the Town of Natick has monitored the Natick Housing Authority Cedar Gardens project consisting of seven HOME units. During this time, town staff met with the Natick Housing Authority and reviewed administrative practices including income verification policies, reviewed tenant files for each of the seven units, and visited two units in addition to the two that were rehabilitated as part of the project. The Town continues to send a non-forwarding letter to each recipient of its Downpayment Assistance Program on a yearly basis. The letter requests the home owner confirm the compliant status of the affordable unit, and sign and return the letter to the Community Development Department in Natick.

PART E. DISPLACEMENT AND RELOCATION

The rehabilitation of the two units at Cedar Gardens required no relocation as the units were unoccupied at the time. There were no other projects requiring relocation. Both of the upcoming NHA projects, the Coolidge House and 6 Plain Street, are currently vacant and the rehabilitation work will require no relocation measures.

PART F. STATUS OF LOANS

The Natick Down Payment Assistance Program was conducted in FY09 and distributed eight deferred loans in the total amount of \$103,700 in HOME funds. This is the balance of the Natick Downpayment Assistance Program, as the program was discontinued due to conflicts with the HOME and DHCD affordable housing restrictions. All recipients of the loans have maintained compliance with the HOME program through the balance of FY15 (see below). Another downpayment assistance program was conducted in later years using Natick Affordable Housing Trust funds, which distributed \$90,000 in ten loans. This is not to be confused with that program.

HOME DPA Loan ID	Loan Date	Original Loan Amount	Amount Forgiven As Of 8/05/2015	Amount Owed As Of 8/05/2015
DPA 1	8/19/2010	\$15,000	\$2,482.20	\$12,517.81
DPA 2	8/3/2010	\$15,000	\$2,504.11	\$12,495.89
DPA 3	7/26/2010	\$15,000	\$2,515.07	\$12,484.93
DPA 4	6/25/2010	\$15,000	\$2,557.53	\$12,442.47
DPA 5	6/03/2010	\$13,700	\$2,363.41	\$11,336.59
DPA 6	5/28/2010	\$15,000	\$2,595.89	\$12,404.11
DPA 7	6/02/2010	\$10,000	\$1,726.03	\$8,273.97
DPA 8	5/28/2010	\$5,000	\$865.30	\$4,134.70

PART G. ANNUAL PERFORMANCE REPORT:

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
Downpayment Assistance	0	8	8
Renter households	0	0	0
Owner households	0	8	8
Cedar Gardens	2	5	7
Renter households	2	5	7
Owner households	0	0	0

Minority Owned Businesses						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non-Hispanic	Hispanic	White non-Hispanic
Number of contracts	-	-	-	-	-	-
Dollar amount of contracts	-	-	-	-	-	-
Number of sub-contracts	-	-	-	-	-	-
Dollar Amount of sub-contracts	-	-	-	-	-	-

Women Owned Businesses			
	Total	Women Owned	Male Owned
Number of contracts	-	-	-
Dollar amount of contracts	-	-	-
Number of sub-contracts	-	-	-
Dollar Amount of sub-contracts	-	-	-

TOWN OF NEEDHAM

PART A. ASSESSMENT OF GOALS AND OBJECTIVES – OVERALL

The following table summarizes HOME Program activity in FY15. The Town of Needham worked with the Charles River Center (also known as the Charles River Association for Retarded Citizens) on the development of a group home for five (5) physically and cognitively disabled residents. The project not only provided much needed special needs housing, but it also extended assisted housing to an underserved area of the community (census tract 4033). In addition to the HOME-funded unit, an additional nine (9) affordable units were completed in Needham including two (2) rental units at The Residences at Wingate, one (1) rental unit at Needham Place, two (2) condominiums at Webster Street Green, and four (4) condo units at Greendale Village.

Project Name	Budget	Contract Amount	HOME Units	Total Units	HOME Funds Expended in FY15	Project Status
1285 South St.	\$1,258,053	\$280,000	1	1	100% of funds drawn down	Fully leased and occupied

Priority #1: Housing needs of small family renters with incomes less than or equal to 30 percent of AMI.

The Town of Needham hired a Community Housing Specialist in January 2014 who has bolstered the Town’s capacity to promote and preserve affordable housing, including rental housing for low-income households. One of the Housing Specialist’s responsibilities has been to prepare a Plan for how the Town will address unmet housing needs. The Town had been planning to prepare a Housing Production Plan but impending Chapter 40B rental developments are likely to involve more than 500 new rental units, 25% of which will be affordable, and consequently the Town is expected to soon surpass the 10% state affordability goal. Nevertheless, it is committed to addressing local housing needs and is in the process of preparing a Housing Strategy to identify community housing priorities. It is expected that the housing strategies will continue to be largely directed to additional rental opportunities with HOME funds, Community Preservation Funding and other local resources invested in further diversifying the housing stock and serving those most in need.

Needham also adopted new zoning to promote affordable housing and smart growth development. For example, the Town rezoned Needham Center as part of a comprehensive plan for the future of the downtown. The goal of the Needham Center planning effort was to create a mixed-use downtown shopping district consistent with smart growth and transit-oriented development principles that boosts housing opportunities, including affordable housing. The Planning Board approved a ten-unit mixed-

use rental development in July 2012 pursuant to this new zoning that includes an affordable unit with two bedrooms and a den. The Town worked with the developer to make sure that the affordable unit met all requirements under the state's Local Initiative Program (Local Action Unit), entering into a Regulatory Agreement and Monitoring Services Agreement to insure the unit's long-term affordability, approving the Affirmative Fair Housing Marketing and Tenant Selection Plan, and participating in the lottery. Construction was completed by the end of March 2015, and the affordable unit was occupied on April 1st.

The Town is preparing new zoning for an area of the community that lies between Routes 128 and the Charles River, north of a major commercial corridor, Highland Avenue. This zoning is meant to promote higher density, mixed-use development, including affordable housing; and is further expected to generate a mix of new rental and ownership opportunities for families, seniors and single individuals. The zoning amendment is scheduled to be part of the warrant for the fall 2015 Town Meeting.

The Town has also met with representatives of Metro West Collaborative Development, a regional non-profit housing organization and WestMetro HOME Consortium CHDO whose mission is to mobilize resources and identify opportunities for improving the quality of life for those living in Metro West communities, including the creation of affordable housing. The Town is continuing to communicate with this organization on potential affordable housing opportunities in Needham, focusing largely on potential subsidized rental developments.

Priority #2: Housing needs of elderly renters with incomes less than or equal to 30 percent of AMI.

The activities listed above also apply to this priority. Additionally, residents approved a new Elder Services Zoning District at the May 2010 Annual Town Meeting to allow individuals to "age in place" in a campus environment that includes separate housing for those who live independently, need more support through assisted living units, and require skilled nursing care. There is a ten percent (10%) affordable housing requirement in the district for the independent living units.

The Planning Board approved a Special Permit in 2011 to enable the developer of Wingate at Needham Nursing Home to build a senior housing facility on Gould Street, called The Residences at Wingate, next to its nursing home at 589 Highland Avenue. The building includes 91 total units – 12 Independent Living Apartments (13 bedrooms), 42 Assisted Living units, and 37 Assisted Living units specializing in Alzheimer's and other memory loss related conditions. The project, now completed, includes two (2) affordable units with one (1) reserved for those who live or work in Needham. The Town entered into a Monitoring Services Agreement to monitor and insure the long-term affordability of these units. The affordable units were fully leased and occupied in 2014 by tenants earning less than \$34,000.

The Planning Board approved a second phase of The Residences at Wingate on October 20, 2014 to amend the Major Project Site Plan Special Permit for the first phase by constructing a 52-unit addition that would include five (5) affordable units. These affordable units will include a one-bedroom unit, three (3) one-bedroom units with dens, and a two-bedroom unit, all to remain affordable in perpetuity. While the units will be marketed to those earning at or below 80% AMI, it is expected that at least the occupants of the one-bedroom units will have incomes in line with the first phase. The two-bedroom units will provide area couples with an affordable option for downsizing from their current homes.

The Town, working closely with the Charles River Center, completed a group home at 1285 South Street that is configured as a single-story structure providing a home for five (5) people with significant physical and cognitive disabilities. Tenants receive 24/7 staffing and comprehensive nursing care. The home exceeds all architectural barrier regulations and includes spacious corridors, roll-in showers, safety and emergency systems, accessible entries and appliances, etc. The Town allocated \$280,000 in HOME Program funding to support development financing as well as \$220,000 in Community Preservation Funds. The group home was fully leased and occupied by the end of 2014.

The Town of Needham is also providing support to the Needham Housing Authority (NHA) in its efforts to redevelop rental housing for elderly and disabled residents at its Linden-Chambers development. This project would not only result in improved living conditions for existing tenants but also provide a net increase in the number of units. The existing development includes 152 units that are occupied by those earning within 30% AMI. Its older single-story configuration is antiquated, not energy-efficient, does not incorporate handicapped accessibility, and does not effectively utilize the existing site. The Housing Authority also owns a parcel of land along the commuter rail line on Yurick Road that is close to the Linden-Chambers development and is expected to be integrated into the redevelopment effort to accommodate additional units.

The Town provided NHA with Community Preservation funding to undertake a preliminary feasibility analysis that included the preparation of a Housing Needs Assessment as well as engineering and financial analyses of site conditions and various development and financing options. The NHA held a special meeting to discuss the results of this feasibility analysis and next steps in February 2014, which included a representative of the Town of Needham's Planning and Community Development Department. NHA is continuing to explore redevelopment options for Linden-Chambers.

Priority #3: Housing needs of elderly owners with incomes less than or equal to 30 percent of AMI.

The Town approved a Chapter 40B housing development on Greendale Avenue, known as Greendale Village, containing 20 townhouses that includes four (4) affordable units for buyers earning at or below 50% area median income (AMI). The Planning Board supported the project as a whole as it is consistent with the Town's Local 40B Guidelines and represented the type of affordable housing development that the Town wishes to encourage. The Town was involved in reviewing the Affirmative Fair Housing Marketing and Tenant Selection Plan, supported marketing efforts, and participated in the lottery. The project was marketed to both seniors and families. The project is largely completed with the first affordable units occupied in June 2015.

The Town also approved a ten-unit Chapter 40B condominium development at 28 Webster Street known as Webster Street Green. Two (2) of the units are affordable to those earning at or below 50% AMI. As with other recent affordable developments, the Town was involved in reviewing the Affirmative Fair Housing Marketing and Tenant Selection Plan, supporting marketing efforts, and participating in the lottery. Both seniors and families were encouraged to apply. Both affordable units are now occupied.

As mentioned above, the Town is also preparing new zoning for a part of Needham located between Route 128 and the Charles River and north of Highland Avenue, a major commercial corridor. This area has been determined appropriate for greater density and mixed uses, and if approved is expected to

attract both rental and ownership opportunities for families, seniors and single individuals. The zoning also includes a mandate that at least 10% of the units be affordable. The zoning amendment is scheduled for vote by Town Meeting in fall 2015.

Number and types of households assisted with HOME funds: The group home at 1285 South Street provides a home for five (5) adults with significant physical and cognitive disabilities, all primarily reliant on Social Security Disability income.

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES – PUBLIC HOUSING

The Town collaborated with the Needham Housing Authority (NHA) on the High Rock Estates project in the past, a project that has been widely praised. The Town is now working with the NHA on plans for redeveloping its Linden-Chambers project by funding preliminary feasibility work including a Housing Needs Assessment as well as engineering and financing analyses. The Town will also work to make sure public housing residents are included in the marketing of any affordable rental or ownership opportunities as they arise.

Over the past few months, the Housing Authority has focused its attention on emergency remediation and repair work related to water infiltration damage from winter storms and ice dams at its Seabeds Way development. The property is comprised of four buildings which house elderly and disabled individuals, the vast majority of whom are frail and suffer from serious health conditions. NHA is replacing all roofs, repairing building facades, and making interior repairs. Bedroom carpeting was removed from units and replaced by more durable vinyl tile. Bedroom closets had to be emptied, contents packed and stored, and walls and insulation removed. The closets have been sealed off for safety until exterior repairs are made. Moreover, results from engineering studies revealed significant microbial growth and some structural damage which had to be immediately addressed. The total cost of the repairs is in excess of one million dollars. A few residents were moved temporarily, however most residents have remained in place throughout the repair process. Concern for the welfare of the frail population during this emergency has been NHA's top priority, but it expects to be able to refocus its attention on the redevelopment of the Linden-Chambers project after the problems at Seabeds Way have been resolved, expected in late 2015.

The major barrier to progress has been funding for the repairs and the administrative burden of the public procurement process. A significant amount of staff time has been dedicated to this project, including working with residents on an individual basis. Many of these residents have serious mental and physical issues which required collaboration with outside sources to develop a respite plan or support services to enable NHA to perform the necessary work in the units.

Nevertheless, NHA has continued to work to reinvigorate the tenant groups which are a means for tenants to gather and discuss concerns and visions for their particular developments. These groups create a communication channel to the administration and empower residents by giving them a role in decision-making. NHA established Resident Advisory Boards (RAB) for its Seabeds Way and Captain Robert Cook Drive developments which had input into the Housing Authority's Five-Year Strategic Plan and recent emergency repair issues.

In response to the Seabeds Way emergency, the Housing Authority has held a series of meetings and conversations with tenants to discuss concerns, sent out weekly updates, and encouraged them to voice their opinions on the repair process. NHA brought in legal counsel to explain the public

procurement process and the steps needed to address the situation. It also held several tenant meetings to discuss upcoming capital improvements and potential policy changes.

NHA has also engaged residents on the following other issues:

- Bringing tenants into discussions about gardening policies with a resident volunteer working with the children on gardening and sustainable resources.
- Coordinating transportation for children to summer activities.
- Providing more opportunities for residents for whom English is a second language.
- Initiating a series of conversations about current events to encourage more social interaction among elderly residents.
- Maintaining an active relationship with local colleges and schools that provide opportunities for children to learn and interact in healthy ways.

As mentioned above, the Town is assisting the Needham Housing Authority in its plans to redevelop its Linden-Chambers project. Residents will be involved and informed as NHA moves forward in the planning and development process later in the year. The Housing Authority will work closely with the project's Tenant Association and hold ongoing information sessions.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

In accordance with 24 CFR 92.350 and to further the Town's commitment to non-discrimination and equal opportunity, the Town of Needham will not discriminate on the basis of race, color, national origin, religion, or sex. The Town adheres to all procedures outlined in the WestMetro HOME Consortium Affirmative Marketing Policy.

The Town supported specific affirmative marketing efforts and lotteries that were conducted for the Greendale Village and Webster Street Green developments, both Chapter 40B homeownership projects that included four and two affordable units, respectively, for those earning at or below 50% AMI. The Town reviewed and commented on the Affirmative Fair Housing Marketing and Tenant Selection Plans and insured that all municipal employees, including School Department employees, were notified of the projects and had an opportunity to apply. The Town's Community Housing Specialist also kept a list of those who made inquiries regarding affordable housing opportunities prior to the marketing periods and notified them when applications became available. The Housing Specialist was also available to answer questions on the projects and to make the appropriate referrals.

The Planning and Community Development Department also assisted a minority applicant on the day of the Greendale Village application deadline, helping her to connect with the developer's marketing agent and submit all of the necessary application materials. This applicant was subsequently selected through the project's lottery. Both projects have recently been completed and are largely occupied. The Community Housing Specialist also worked with the developer of the mixed-use building at 50 Dedham Avenue, the project known as Needham Place, and the developer of The Residences at Wingate to insure that the Affirmative Fair Housing Marketing and Tenant Selection Plans met all state requirements and the affordable units were affirmatively marketed. The Town has executed a Monitoring Services Agreement with both developers to monitor affordability on an annual basis.

The Town is also assuming responsibilities for monitoring the affordability of five (5) older comprehensive permit projects where the identified monitoring agents were no longer interested or capable of performing these functions. The Board of Appeals amended its decisions to designate the Town Manager or his/her designee as monitoring agent in June 2014, and the Town's Community Housing Specialist is now monitoring the affordable units on an annual basis to insure that the purchasers continue to live in the units as their primary residence and that any turnover of units meets the terms and conditions of the affordable housing restrictions.

Moreover, the Town is assuming responsibility for monitoring the affordability of the units at the South Street group home. The Town will conduct an annual monitoring of this project to insure continued compliance with HOME requirements.

Additionally, to be consistent with 24 CFR 92.350, the Town will make every effort to encourage the inclusion of minority and women's business enterprises in HOME-funded activities. For example, the Town worked with the Charles River Center to obtain documentation regarding any minority participation in the development of the group home at 1285 South Street. This recent experience has improved the Town's understanding of the Section 3 process and should enable the Town to work more effectively with project sponsors, developers and contractors in promoting minority and women-owned businesses in future HOME-funded development.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

Needham completed the process of writing an *Analysis of Impediments to Fair Housing Choice (AI)*, last updating it in 2015. The impediments identified in the AI as well as the proposed strategies and actions taken are listed below.

Impediment #1: Land use policies and zoning can limit the quantity of multi-family housing and the availability of developable land to achieve fair housing.

Impediment #2: Lack of information, education, and outreach on fair housing.

Impediment #3: Lack of accessible affordable housing and lack of affordable housing.

Impediment #4: Lack of accessibility.

The Town has implemented the following strategies to help address these issues:

- *Promoting multi-family housing that incorporates affordable and accessible units – Housing in the Town Center.*

The Town has been working toward increasing multi-family residential development and affordable housing options in high opportunity areas such as Needham Center and Needham Heights where public transit, jobs, services, and facilities are readily available. Needham's Analysis of Impediments (AI) shows that affordability in housing disproportionately affects people in protected classes and that the lack of multi-family residential development and affordable housing options can create a barrier to living in Needham. Just several years ago, (at the time of the original AI), there were neither incentives nor requirements for new multi-family residential development nor inclusionary zoning mandates in the Zoning Bylaw.

In the years directly following the completion of the AI, Needham completed a comprehensive plan for the future of Needham Center. The plan addressed the overall objectives of fostering the economic development of Needham Center as a mixed-use downtown shopping district,

increasing housing opportunities, enhancing aesthetics and the pedestrian environment, and improving parking and traffic conditions. The zoning authorizes the construction of multi-family housing in Needham Center and includes a specific requirement of providing affordable housing. The Town approved a ten-unit (one affordable unit) mixed-use development in Needham Center in July 2012, and the property was leased and occupied in April 2015. The Town participated in the development of the Affirmative Fair Housing and Tenant Selection Plan as well as the lottery. It also entered into a Monitoring Services Agreement with the developer to annually monitor the affordability of the unit and insure that any unit turnover complies with the special permit and state affordability requirements, including affirmative marketing. Perhaps with this development approved, other property owners will decide to pursue similar mixed-use developments in the area.

By enabling the development of multi-family residential projects in Needham Center, the Town will also increase the supply of accessible housing. Under federal law, all new residential developments with four or more units, public entrances, and common spaces must be wheelchair accessible. In addition, at the very least, all ground units must be wheelchair accessible and fittings must be adaptable (e.g. bathrooms must be constructed in such a way that grab bars can be added). In elevator buildings, such as the one just approved, all units must be wheelchair accessible and adaptable.

Finally, the Town has begun work on a proactive Housing Strategy that will continue to promote multi-family rental housing with affordable and handicapped accessible units.

- *Promoting multi-family housing that incorporates affordable and accessible units – New zoning for senior housing.*

In May of 2010, Town Meeting approved a new Elder Services Zoning District to allow individuals to “age in place” in a campus environment that includes separate housing for those who live independently, need assisted living facilities that offer more support, and require skilled nursing. There was a 10% affordable housing requirement included in the district. On October 4, 2011, the Planning Board approved a project under the new zoning, The Residences at Wingate, that comprised 91 units including 12 Independent Living Apartment units (13 bedrooms), 42 assisted living units, and 37 assisted living units specializing in Alzheimer's and other memory loss related conditions. Under the provisions of the bylaw, two (2) of the 12 Independent Living Apartments are reserved for low-income seniors and are now occupied. As required by federal law, all of the new residential units will be fully accessible. The Town was involved in the affirmative marketing process and a lottery was held on January 17, 2014 to select the occupants. The Town is also assuming the role of Monitoring Agent for the project.

Another phase of this project has been approved by the Planning Board through an amendment to the Major Project Site Plan Special Permit issued for the first phase. This second phase involves a 52-unit addition to the initial project with five (5) affordable and accessible units including a one-bedroom unit, three (3) one-bedroom units with dens, and a two-bedroom unit, all to remain affordable in perpetuity.

- *Promoting multi-family housing through the Chapter 40B comprehensive permit process.*

The Town is supporting a Local Initiative Program (LIP) application for a 390-unit multi-family rental development in Needham Crossing, formerly called the New England Business Center. Several years ago the Town rezoned this area to promote higher density and mixed uses. The LIP application was submitted to DHCD on April 2015, and the Town expects the comprehensive permit to be issued towards the end of 2015. This project, known as 2nd Avenue Residences, will provide 98 new affordable rental units that include 12 studios, 39 one-bedroom units, 37 two-bedrooms, and 10 three-bedroom units. This project will further diversify Needham's housing stock and meet housing needs for families, seniors, and single individuals. The development will include elevators and 20 units will be handicapped accessible with another eight (8) for those with sensory impairments.

- *Hiring a Community Housing Specialist/Planner.*
The Town hired a Community Housing Specialist in 2014 who is responsible for coordinating a wide range of activities related to housing in the community, including ways to insure greater and fair access to existing housing as well as opportunities to increase the availability of new affordable and accessible units. The Housing Specialist is preparing a housing section on the Town's website with a considerable amount of information on fair housing issues including how to recognize if one has been a victim of discrimination and how to file a complaint.
- *Preparing to undertake additional planning to assess and address housing needs, including fair and equal access to housing.*
The Town is embarking on a community planning process to further identify local housing priorities once Needham reaches the 10% affordability goal under Chapter 40B, something the Town expects to surpass in late 2015. Staffed by the Housing Specialist, the work will provide another opportunity to raise the issue of fair housing and identify strategies to promote equal and fair access to housing in the community. This planning effort will also support and complement the work that will be conducted on the FY16-FY20 Consolidated Plan.
- *Participating in the implementation of the Regional Fair Housing Plan*
Needham participated in the WestMetro HOME Consortium's recent effort to prepare a Regional Fair Housing Plan. This Plan outlined a number of activities that the Town will implement over the next few years in coordination with the HOME Consortium. A significant number of the outlined strategies for addressing fair housing needs include better outreach and education on the issue which while critical are challenging as well. The Town will begin work on the implementation of the Plan this year.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

The high costs of housing in Needham; limited local resources to subsidize housing; antiquated public housing units; language barriers; and health issues, particularly for special needs populations; make it difficult to adequately serve those living below the poverty level. However, the Town is working with the Needham Housing Authority on efforts to serve such households who represent the most vulnerable of Needham's residents.

The Town updated a Housing Needs Assessment in 2014 that was completed by the Needham Housing Authority (NHA) in 2013, and which suggests that there are growing income disparities in Needham. While income levels are largely increasing, poverty is too, especially among seniors.

To address this issue, the Town is supporting Needham Housing Authority's efforts to redevelop its aging Linden-Chambers development that includes 152 units for extremely low-income seniors and younger disabled residents. This project would not only make existing units more livable but add much needed new affordable units in the community. Town support has included funding to assist the NHA in early project feasibility analyses as well as the inclusion of the Town's Community Housing Specialist in early project meetings.

During the last few months NHA has needed to focus on emergency repairs that were needed due to this past winter's storms and resulting ice dams at its Seabeds Way development. The total cost of the damages was over \$1 million and considerable staff time was also needed to not only deal with the necessary improvements, including procurement requirements, but the pressing needs of the elderly and disabled tenants, most who are frail and suffer from serious health conditions. It is expected that all of the work will be completed by December 2015, when NHA will be able to refocus on the Linden-Chambers redevelopment project. It is expected that this project will necessarily have to occur in phases to avoid the unnecessary relocation of existing tenants and to secure sufficient financing.

Additionally, the HOME-funded group home at 1285 South Street, which opened in 2014 and was fully occupied in early 2015, is assisting five (5) severely disabled adults who are living primarily on Social Security Disability Income.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS:

The HOME-funded group home at 1285 South Street received Energy Star certification.

PART B. LEVERAGING:

Through a commitment of \$280,000 in HOME funding, the group home at 1285 South Street leveraged almost a million dollars in other public and private funding as follows:

Source/Category	Amount
Fundraising/operations revenues for property acquisition	\$355,000
Needham Community Preservation Commission (towards local match of HOME funds)	\$220,000
FY12 Annual Appeal (unrestricted)	\$70,000
Building a Dream Benefit Gala, May 2012 (unrestricted)	\$115,000
Exchange Golf Club Tournament (July 2012)	\$15,000
Charles River Center 5K/1 mile Walk (September 2012)	\$25,000
Dedham Savings Bank	\$10,000
Highland Street Foundation	\$5,000
Other Foundation/Individual Support (Amelia Peabody Charitable Fund; Needham Bank; Middlesex Savings Charitable Foundation; Agnes Lindsay Trust; etc.)	\$163,053
TOTAL	\$978,053

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

Each time the Town allocates (or reallocates) funds, staff holds an advertised public hearing with the Planning Board. The Town has worked closely with the Charles River Center to provide important support for its group home at 1285 South Street, including \$280,000 in HOME funding and \$220,000 in Community Preservation funds, funding that has been approved by the Planning Board and Community Preservation Committee, respectively. Construction is now complete and the project is fully occupied. All of the HOME allocation has been drawn down.

The Town is enhancing its ability to oversee housing activities, including efforts to better engage local housing stakeholders and residents, through the hiring of a Housing Specialist in 2014, who coordinates community housing activities and serves as Needham's representative to the WestMetro HOME Consortium.

The Town has also made progress with respect to dispersing affordable and accessible housing to underserved areas of the community through the HOME-funded group home at 1285 South Street (census tract 4033).

PART D. MONITORING

The Town is continuing to work with NHA on the monitoring the two (2) High Rock homeownership units that were funded by HOME. The Town of Needham has been working with NHA on the preparation of an Application Package and process for reselling any of the units from High Rock Homes. While a couple of owners have expressed some early interest in selling, they have not yet made any decisions to do so.

The Town of Needham will also assume monitoring responsibilities for the group home at 1285 South Street in compliance with all HOME requirements as well as state guidelines under the Local Initiative Program (LIP) where applicable.

PART E. DISPLACEMENT AND RELOCATION

N/A

PART F. STATUS OF LOANS

There is a loan in the amount of \$287,516 to High Rock Homes LLC that is forgivable. The provisions of the loan have been satisfied. Another loan of \$280,000 was committed to the group home at 1285 South Street sponsored by the Charles River Center. All of this funding has now been drawn down.

PART G. ANNUAL PERFORMANCE REPORT:

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
1285 South Street Group Home Development	5	--	5
Renter households	5	--	1 unit with 5 occupants
Owner households	0	--	--

Minority Business Enterprises						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non-Hispanic	Hispanic	White non-Hispanic
Number of contracts	1	--	--	--	--	\$280,000 to Charles River Center
Dollar amount of contracts	\$280,000	--	--	--	--	--
Number of sub-contracts	--	--	--	--	--	--
Dollar Amount of sub-contracts	--	--	--	--	--	--

Women Owned Businesses (compared to Male Owned Businesses)			
	Total	Women Owned	Male Owned
Number of contracts	1	--	1
Dollar amount of contracts	--	--	--
Number of sub-contracts	--	--	--
Dollar Amount of sub-contracts	\$280,000	--	\$280,000

Minority Property Owners						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non-Hispanic	Hispanic	White non-Hispanic
Number of owners	1	--	--	--	--	1
Dollar amount of HOME funds	\$280,000	--	--	--	--	\$280,000

TOWN OF SUDBURY

The Town of Sudbury has an active affordable housing program, and has addressed the goals and objectives established in the FY15 Annual Action Plan. This CAPER report primarily reports on HOME-funded projects and activities, and does not cover all affordable housing initiatives in Sudbury.

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES – OVERALL

Sudbury made progress in meeting its HOME specific housing goals and objectives throughout FY15.

Priority #1: Housing needs of first-time homeowners with incomes between 51 and 80 percent of AMI.

Sudbury had no active HOME ownership or rental projects in FY15.

For non-HOME funded projects, construction started on the Maynard Road Homes, a three-unit homeownership project, in FY15. All units will be sold to income-eligible households earning below 80% of the AMI. This project is sponsored by the Sudbury Housing Trust, though was put on hold due to budget constraints for the last 24 months. Additionally, Sudbury continued the Home Preservation Buydown Program through the provision of local subsidy to convert a market-rate home to an affordable home, with a perpetual deed restriction. Seven homes have been converted under this program, with an eighth underway.

Priority #2: Housing needs of family renters with incomes between 30 and 100 percent of AMI.

Sudbury completed the Coolidge HOME-funded project in FY15.

In 2013, Sudbury completed the construction of the Sudbury Housing Authority redevelopment project. This project provided an additional six units of rental housing for households earning less than 60 percent AMI.

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended to date	Project Status
The Coolidge at Sudbury	\$96,666	\$96,666	1	64	\$96,666 (Expended in July 2013)	Completed in FY15 (Occupancy in August 2014)

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES – PUBLIC HOUSING

Like most housing authorities, Sudbury’s Housing Authority continued to experience high demand across all programs, with waiting lists stretching multiple years in the future. The Housing Authority continued to explore options for creating new affordable units in FY15.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

Sudbury continued to serve as a local and regional resource for potential buyers, and performed extensive outreach for affordable housing lotteries, with an emphasis in minority channels. Marketing was performed in Sudbury for the lotteries for the Home Preservation Program and Landham Crossing in the fall of 2012 and spring of 2014, the Sudbury Home Preservation Program in January 2013, and the Carriage Lane condominiums in the spring of 2013. Sudbury has performed lottery and resale services for the following towns: Acton, Bedford, Belmont, Concord, Holliston, Lincoln, Medford,

Newton, Norfolk, Tewksbury, Wayland, and Weston. Through these efforts, Sudbury has developed expertise in Affirmative Fair Marketing and prepares plans compliant to those guidelines. Advertising is undertaken to increase participation by minorities, and feedback indicated that it is effective.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

In FY15, Sudbury supported the completion of the WestMetro HOME Consortium Regional Fair Housing Plan. Sudbury will undertake the outlined activities in the action plan including fair housing training sessions in FY16.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

Sudbury has a limited number of persons living below the poverty level. The Town employs a social worker, and links residents in need to available services. Additionally, the Town has a charitable Community Assistance Fund to help with housing and other expenses beyond the reach of lower-income households.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS

The Coolidge at Sudbury HOME project created 64 new Energy Star units upon completion. While the number of all newly constructed housing units completed that have received an Energy Star certificate is unknown, much progress has been made in Sudbury over the past two fiscal years towards sustainable housing. Sudbury has received Green Community status from the Executive Office of Energy and Environmental Affairs, and adopted the Energy Stretch Code in 2012. The requirements for qualifying as a Green Community are not easy, but there are real benefits, including energy and cost savings, environmental benefits, and reduction of greenhouse gases. Sudbury plans to develop three units of net zero energy affordable homes during FY16 in the Maynard Road Homes project.

PART B. LEVERAGING

The Coolidge at Sudbury completed in FY15. The table below details the leveraging for this project.

Category	Amount	Source
Additional HUD Grant(s) Leveraged	\$550,000	DHCD HOME
Additional Federal Funds Leveraged	\$10,668,933	Low Income Housing Tax Credits
Additional State Funds Leveraged	\$750,000	State Housing Stabilization Fund, and State Affordable Housing Trust Fund
Locally Leveraged Funds	\$250,000	Community Preservation Funds
Other	\$2,470,000 \$19,998	BoA mortgage Deferred development fee
TOTAL>>>	\$14,708,931	--

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

Sudbury has developed a strong organizational structure to support the success of HOME projects and all other elements of the Town’s housing agenda. The Sudbury Housing Trust, chartered in 2007, is charged with the creation and preservation of affordable housing through the speedy and orderly acquisition, rehabilitation, renovation, construction, financing, and refinancing of property within the Town of Sudbury. Sudbury has adopted the Community Preservation Act, and the Sudbury Town Meeting appropriated over \$3.7 million for local affordable housing projects over the last 12 years under that legislation. Sudbury is a member of the Regional Housing Services Office which supports efforts for the Town.

PART D. MONITORING

The Coolidge project is monitored by DHCD, in addition to the Town. The Town performs annual monitoring for the affordable homeownership units and the Sudbury Housing Authority performs annual monitoring for the affordable rental units. Other private affordable rental units are monitored by their respective management companies.

PART E. DISPLACEMENT AND RELOCATION: N/A

PART F. STATUS OF LOANS

Sudbury has no outstanding HOME loans as of the end of FY15.

PART G. ANNUAL PERFORMANCE REPORT:

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
The Coolidge at Sudbury			
Renter households	--	1 (below 60%)	1 HAU
Owner households	--	--	--

Minority Owned Businesses						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non- Hispanic	Hispanic	White non- Hispanic
Number of contracts	1	--	--	--	--	1
Dollar amount of contracts	\$96,666	--	--	--	--	\$96,666

Women Owned Businesses			
	Total	Women Owned	Male Owned
Number of contracts	1	1	NA
Dollar amount of contracts	\$96,666	\$96,666	--

CITY OF WALTHAM

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES - OVERALL

Priority #1: Support local non-profit organizations that shelter and provide services to homeless in Waltham, to promote and enhance access to decent housing.

Objective: Suitable living environment

Accomplishments: Actual Served 3,106

Progress Assessment: The City is beginning to enhance and strengthen its research and assessment role and support for homeless issues in Waltham. The Housing Department will continue to collaborate with the Waltham Police Homeless Committee, who has actively identified Waltham Homeless through an individual count, obtaining names and birthdates in 2015. The addition of an Outreach worker in 2015 will help the city identify individual needs of the Waltham homeless population. The City will continue to participate in the Brookline Newton Waltham Watertown Continuum of Care.

CDBG Grant Recipient & Program	Proposed Count	Actual Persons Served
MHSA Bristol Lodge Homeless Shelter & Soup Kitchen (\$16,680)	135	383
MHSA Mary's House Family Shelter (\$8,875)	8	46
Salvation Army Emergency Assistance & Food Pantry (\$9,118)	158	2677

Bristol Lodge Soup Kitchen operates 365 days per year, daily between 60 and 110 people come to the kitchen for a hot, nutritious meal prepared and served by volunteers. In addition to the hot meal program, 18,000 sandwiches are prepared annually for the homeless. Guests are allowed in daily at 3:30PM. Coffee and snacks are provided. Meal is served at 5:00PM. The kitchen relies heavily on volunteers, donated food and paper products from local businesses, churches, schools and individual residents of Waltham and the surrounding communities.

Both the men's (Bristol Lodge) and women's shelters (Mary's House) provide emergency shelter to a combined total of fifty seven homeless area residents each night. Staff at each location is trained to provide a variety of specialized and essential services. Support staff is trained to provide all guests with a safe and supportive environment. Case managers' help guests locate permanent housing, provide supportive counseling, refer guests to other agencies as needed, organize in-house AA meetings, offer employment counseling groups, and assist clients with entitlement benefits such as SSI or SSDI. Each and every guest has an individualized goal plan.

The Salvation Army H.O.P.E. Kitchen provides free meals during breakfast and lunch to Waltham residents during the year. The kitchen serves meals during week days and allows guests the opportunity to drop in for meals between 10am and 12pm. The Salvation Army Community Food Pantry provides Waltham residents with five days' supply of food (three meals per day) for the month and is open Monday through Friday.

Additionally, during the winter months, the City opened the former Bright School gymnasium as an emergency shelter when temperatures dropped into the single digits and below zero. The shelter was open on various dates from January 7th to March 15th for a total of 21 nights due to extreme weather. Opening the shelter allowed the City to identify and reach out to a total of 304 individuals. Since the winter months, the City of Waltham Police Homeless Taskforce has identified 198 of those individuals to still be homeless.

Many of the individuals staying in the Bright shelter were categorized chronically homeless, coming back each night the shelter was open. Based on the number of chronically homeless, the City is funding a case worker position to assist in triaging homeless individuals and putting them in touch with necessary services with CDBG funding in 2015.

Piloted in 2014, the City of Waltham Housing Department began the CDBG Emergency Assistance Program, a grant program for homeless individuals or those in transitional housing, seeking permanent housing. The program is available for those individuals either homeless or in immediate danger of becoming homeless due to a natural disaster. The program assisted two families in Program Year 41.

The Housing Division has begun a HOME Tenant Based Rental Assistance (TBRA) Security Deposit Program in April of 2015. The TBRA assistance is not tied to a specific unit, so tenants may move to a different unit without losing their assistance, subject to individual program rules. The subsidy amount is determined in part based on household income and rental costs associated with the tenant's lease. HOME funding in the amount of \$357,378.81 is available for the pilot program. The program provides a security deposit payment and first month's rent payment to eligible applicants. The Housing Department has approved 25 eligible households in 2015 that are at or below 80% of the AMI. 90% of available funds will be used for those at 60% or below the AMI.

Priority #2: Assist with housing needs of small family renters with incomes between 0 and 30 percent AMI.

Objective: Expand access to affordable rental housing

Accomplishments: Breakdown of FY15 HOME funds: \$357,378 budgeted; \$0 expended

Progress Assessment: The Housing Division has processed 25 applications for TBRA assistance and will begin expending funds in 2015. The Waltham Housing Authority has released 19 Section 8 Vouchers in July of 2015 to very low income households who will benefit from the HOME TBRA Program.

- The City added additional units of affordable rental housing in 2015 with the completion of Currents on the Charles and the Merc at Moody. These two housing rental developments have a total of 40 affordable rental units developed through the City's inclusionary zoning ordinance.
- Implementation of the HOME TBRA Security Deposit Program in April of 2015
- The City will continue to provide CDBG funds in the form of interest-free deferred loans for lead paint abatement of one- to four-family units.

Priority #3: Assist with the housing needs of elderly with incomes between 0 and 30 percent of AMI.

Objective: Improve the physical quality and management accountability of public housing and increase housing opportunities for the elderly and disabled.

Accomplishments: 1 HOME Waltham Housing Authority Projects underway, 75-85 Myrtle Street: \$422,227 budgeted; \$246,776.00 expended

Progress Assessment: Work 100% complete at the Winchester Crane Elderly Apartments in 2014 HOME budget of \$468,099.00 expended.. Work 60% complete at 75-85 Myrtle Street, 24 units of elderly housing.

- HOME funded rehabilitation of the Winchester Crane Elderly completed. \$468,099.00 was expended for replacement of heating hot water system, common area flooring replacement and painting, and ADA accessibility improvements, which improved all 59 units on site, 30 of which are designated HOME units. 16 of the HOME units are occupied by elderly tenants below 30% of the AMI.
- HOME funding rehabilitation of 75-85 Myrtle Street Elderly Apartments is underway. Additional underwriting was completed in May 2014 for Myrtle Street to increase the rehabilitation budget to complete a 2nd story railing system and common area flooring. Rehab also includes a new heating hot water system, gas ranges, and electrical upgrades to all 24 units. This work was funded by \$419,466 from the HOME budget and is scheduled for completion for October of 2015.
- The CDBG Homeowner Rehabilitation Loan Program provides an interest free loan to eligible applicants up to \$10,000 that is payable on sale or transfer of the property. The Loan program addresses Lead Paint Abatement and weatherization type repairs to your home. Examples include roofing, siding, windows, furnace replacements, and accessibility improvements. The principal purpose of the City of Waltham’s Housing Rehabilitation Program is to increase the supply of decent, safe and sanitary affordable housing in the City. The Program is funded with federal Community Development Block Grant (CDBG) funds from the U.S. Department of Housing and Urban Development (HUD). Eligible applicants include income-eligible owners of 1-4 family residential structures in Waltham and nonprofit housing organizations. CDBG funding assistance is in the form of a Deferred Payment Loan (DPL) at zero percent (0%) interest due upon sale or transfer of the property.

HOME Projects Active in FY15

Project Name	Budget	Contract Amt.	HOME Units	Total Units	HOME funds expended in FY15	Project Status
HOME Admin FY15	\$18,106	\$18,106.00	0	0	\$17,253.55	Open
Myrtle Street	\$422,227	\$422,227.00	12	24	\$8,550.00	Open
TBRA Security Deposit Program	\$357,378.81	\$357,378.81	0	0	\$0	Open

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES - PUBLIC HOUSING

Goal: Promote decent affordable housing

Objective: Improve the physical quality and management accountability of public and assisted housing. Breakdown of FY15 HOME funds: \$881,707 budgeted; \$703,721.34 expended.

Breakdown of CDBG funds: \$422,227.00 budgeted; \$286,366 expended. Breakdown of CPA funds: \$848,891.00 budgeted; \$848,891.00 expended.

Progress Assessment: The City has met 50% of its goal with current Housing Authority HOME and CDBG projects.

Current 2015 projects administered by the Waltham Housing Authority include:

- Myrtle Street elderly housing rehabilitation is ongoing with a current HOME budget of \$422,227. Renovations include a new heating/hot water system, common area flooring, new gas ranges, electrical upgrades, and replacement of a 2nd story railing system.
- CDBG funding, in the amount of \$200,000, has been awarded for the creation of the Prospect Terrace Community Center in FY14. The City is collaborating with Bentley University, which will assist the Housing Authority in managing the Community Center upon completion. Ongoing work for the concrete patio, rear exit of building will be complete in the fall of 2015. Prospect Terrace is WHA federally-funded family housing.
- CDBG funding in the amount of \$25,000 has been awarded to the Housing Authority for capital improvements to the Chesterbrook family housing community center scheduled to begin in the fall of 2015.

The WHA continues to see cuts in its state and federal budgets annually, although the number of clients it assists continues to increase. The continued use of HOME, CDBG, and CPA funding is necessary for rehabilitation of housing authority properties. Tenant-based rental assistance will support the WHA in its efforts to serve the low- and extremely low-income households in 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 Eight 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. Our resident associations are encouraged to attend the meetings and bring forward any residential community issues.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES- AFFIRMATIVE MARKETING

Goal: Ensure equal opportunity in Housing

Objective: Promote public awareness

Progress Assessment: The City of Waltham follows the *WestMetro HOME Consortium Affirmative Marketing Plan*, and informs the public, owners, and prospective

tenants about the Fair Housing Laws and the Affirmative Marketing Plan in the following manner.

The City began public awareness activities to help residents understand their rights and responsibilities regarding fair housing. These activities included distributing English, Chinese, and Spanish versions of posters regarding Fair Housing Rights. The Housing Division distributed information on free HUD-Approved Housing Counseling Agencies to residents through local social service organizations. The City also began a public awareness campaign for fair housing rights and the responsibility to increase education on these issues. Additionally, the Waltham public cable channel provides information. Education and increased awareness about fair housing for as many individuals as possible will result in:

- Facilitating a more meaningful understanding of the law
- Increased awareness of the rights afforded protected classes and standards to be maintained
- Empowering victims of illegal activities to assert their rights
- Enabling key sectors of the community to act proactively to comply with fair housing provisions

The City of Waltham requires developers who offer affordable units through the special permit process to contract with an approved lottery consultant to ensure that affirmative marketing procedures are in place. These procedures include minority outreach and a fair lottery process to select renters or buyers. This process is approved through the MA DHCD.

The City requires a *Minority Business Enterprise/Women's Business Enterprise (MBE/MWE) Report Form* for each project as part of HOME and CDBG regulatory agreements. The City will continue to encourage the inclusion of minority- and women-owned enterprises in HOME and CDBG funded activities, consistent with 24 CFR 92.350.

The City will host a Fair Housing Training, sponsored by the Fair Housing Center of Greater Boston in the fall of 2015 for tenants and landlords. Affirmative marketing will provide outreach to renters, landlords, realty businesses, the Waltham Housing Authority, the Waltham Police Department. The training will focus on Fair Housing, tenant and landlords rights.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES- IMPEDIMENTS TO FAIR HOUSING

Goal: Promote decent affordable housing

Objective: Increase homeownership and rental opportunities for low- and moderate-income persons, persons with disabilities, the elderly, minorities, and persons with limited English proficiency.

Progress Assessment: The *2013-2018 Analysis of Impediments to Fair Housing Choice (AI)* identified impediments. Because these impediments have not been eliminated, some explanation of actions taken to continue to address them is appropriate.

The high cost of housing, high costs of development and land acquisition, and lack of available land for new development limits opportunities for diverse siting of affordable housing and housing choice. Housing options are limited as a result of the overall shortage of affordable and accessible rental units and extremely low vacancy rates of such units throughout the City. The age of housing stock, combined with the existence of lead paint hazards and limited financial resources for lead paint abatement reduces housing choices for families with young children.

The following actions were taken during FY15 to address those impediments:

- The former Hardy School lottery was held in May of 2014 for 11 affordable elderly units in North Waltham. This 19 unit elderly housing development, owned and managed by the City, is the first elderly housing in North Waltham. Leasing has continued throughout 2015 and 18 units are now leased as affordable to those households at or below 80% of the AMI.
- The continued application of the City's Inclusionary Zoning Ordinance and the adaptive reuse of surplus property facilitate the creation of affordable housing. The renovation of the surplus Banks Elementary School building is complete. The property has been developed into loft-style condominiums with an age restriction households over the age of 62. The property is now out to bid (July 2015) with a requirement to the purchaser that 10% of the units must be affordable to households at or below 80% of the AMI or a deposit must be made into the Municipal Housing Trust Fund in lieu of the units.
- Currents on the Charles (Acadia) is complete and has provided 20 affordable rental units through the City's Inclusionary Zoning Ordinance. The units were leased through a lottery on December 29, 2014 with leasing beginning in April of 2015, approved through DHCD. The Merc at Moody has completed a lottery on July of 2015 for 27 affordable rental units. Construction is ongoing with 50% of the units completed. Leasing is projected to begin in October 2015.
- The continued use of CDBG funds provides deferred de-leading loans and grants to owner-occupiers of multifamily properties. Eight loans totaling \$91,618.00 were completed in FY15. The City has allocated \$177,725.00 in CDBG funding for the Rehabilitation Loan program for 2015.
- Implementation of the HOME TBRA Security Deposit Program to assist renters with funding that will pay a security deposit and first month's rent payment enabling access to permanent housing for low income households.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES- PERSONS LIVING BELOW POVERTY LEVEL

Goal: Strengthen communities

Objective: Help organizations access the resources they need to make their communities more livable.

Progress Assessment: The City has met 100 percent of its goals to provide CDBG funding to social service agencies the serve the homeless or soon-to-be homeless. Breakdown of FY15 CDBG funds: \$134,137 budgeted; \$134,137 encumbered.

The Middlesex Human Service Agency's Mary's House successfully served 33 people - This family shelter provides temporary housing in central Waltham for up to eight homeless families. During this time, families work on issues relevant to homelessness and securing permanent housing with the help of our staff and housing advocates. All residents are involved with the day to day activities in the shelter and the family life program. The family life program consists of helping families with such issues as parenting, nutrition, budgeting, substance abuse, vocational and educational goals. Referrals to other social services, legal and mental health programs are provided as needed. School age children attend local schools. When residents leave for permanent housing, we offer a one year follow-up support program to assist them with the transition to independent living.

The Middlesex Human Service Agency Bristol Lodge successfully served 372 people - Both the men's and women's shelters provide emergency shelter to a combined total of fifty seven homeless area residents each night. Staff at each location is trained to provide a variety of specialized and essential services. Support staff is trained to provide all guests with a safe and supportive environment. Case managers' help guests locate permanent housing, provide supportive counseling, refer guests to other agencies as needed, organize in-house AA meetings, offer employment counseling groups, and assist clients with entitlement benefits such as SSI or SSDI. Each and every guest has an individualized goal plan.

The Middlesex Human Service Agency Bristol Lodge Soup Kitchen successfully served 209 people - Every night, rain or shine, workday or holiday, between 60 and 110 people come to the kitchen for a hot, nutritious meal prepared and served by volunteers. In addition to the hot meal program, 18,000 sandwiches are prepared annually for the homeless. Guests are allowed in daily at 3:30PM. Coffee and snacks are provided. Meal is served at 5:00PM. The kitchen relies heavily on volunteers, donated food and paper products from local businesses, churches, schools and individual residents of Waltham and the surrounding communities.

The Community Day Center of Waltham is a non-profit organization and currently the only day shelter in the metro-west area. The Day Center provides a warm and welcoming place for the homeless and those who may feel alone and isolated. The Center is open Mondays through Fridays from 1:30pm to 4:30pm. In the winter months, the shelter is also open in the morning from 7:30am to 9:00am. Services provided throughout the day include Day-time drop-in center, Internet and Phone Access, Advocacy and Referral, Health Access, Legal Access, Housing Referrals and Job Search Assistance.

The Salvation Army H.O.P.E. Kitchen provided free meals during breakfast and lunch to 1,837 Waltham residents during the year. The kitchen serves meals during week days and allows guests the opportunity to drop in for meals between 10am and 12pm. The Salvation Army Community Food Pantry provided 455 Waltham residents with five days' supply of food (three meals per day) for the month and is open Monday through Friday. The Planning Department and Housing Division also work very closely with the local homeless advocacy coalition, working towards their goal of ending homelessness in Waltham

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES - ENERGY STAR UNITS: N/A

PART B. LEVERAGING

Category	Amount	Source
Additional Federal Funds	\$963,522.00	CDBG funds
Additional State Funds	\$1,288,644	CPA State Match
Locally Leveraged Funds	\$195,671.60	General Municipal revenue for staff costs
Other	\$143,578	CDBG loan repayments
TOTAL>>>	\$1,591,415.60	

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

As required by the U.S. Department of Housing and Urban Development (HUD), the City of Waltham maintains a Citizen Participation Plan which contains the City's policies and procedures for public involvement in the Consolidated Plan process and the use of CDBG and HOME funding. The plan provides for a fifteen day comment period for the Consolidated Annual Performance and Evaluation

Report (CAPER). The CAPER was made available for public comment from July 14, 2015 through August 31, 2015. Public Notice was made available in the Waltham News Tribune and is scheduled for August 10, 2015. Translator services and special accommodations are made available upon request. The City supports maximum public participation in preparation and review of the CAPER. However, public comments received after the mandatory 15-day comment period will still be received, compiled and acted upon. All comments will be forwarded to HUD to be included as a part of the CAPER.

During the program year, a collaborative effort took place among local government, community-based organizations, and private citizens to assemble and integrate all available federal, state, local and private resources to have the greatest possible impact. There was broad agreement that those resources are insufficient to address the growing scale of the problem but there has also been great determination to alleviate these conditions in Waltham to preserve and protect the substantial community development progress that has been achieved historically with HOME and CDBG funds. During the program year, the Housing Division (under the direction of the Mayor) worked closely with the Waltham Housing Authority and the Planning Department to review needs and thus develop a better CDBG and HOME Proposal process moving forward to address housing, economic development, and public service needs and circumstances.

Actions to Further Develop Institutional Structure

The largest gap in resources continues to be the need for additional funding to serve the low-income households in need of housing. The City and its partners continue to search for additional funds from federal, state, and private sources to develop additional housing to address unmet demand for affordable units. The Mayor and the Housing Division partnered with the Waltham Housing Authority to submit an application for \$500,000 of Community Preservation Funds to begin a Tenant Based Rental Assistance program in the City. Three public hearings have been held to address the application. Public comments have been heard and CPA Board recommendations have also been taken into consideration. This is a significant accomplishment given the funding challenges housing authorities face. However, with federal funding for housing programs being cut, the housing authority waiting list continues to grow as demand for affordable housing greatly outpaces available units. The Proposal was not approved by the CPA Board.

HOME funds have been budgeted for a TBRA Security deposit Program to assist low to moderate income households with a security deposit and first month’s rent program. To date the Housing Department has received 25 applications that are now being processed.

In FY15, the Waltham Planning Department completed the Five Year Consolidated Plan for FY16-20. A Community Survey was distributed to Municipal Departments, Social Service Agencies, City Council, and community residents. The cooperation of other municipal departments and outside agencies strengthened the Consolidated Planning process for the City and its residents.

Distribution of expenditures active Waltham HOME program projects

Project	Funding Amount	Expended	Census Tract
Security Deposit TBRA	\$168,671	\$0	Citywide
Myrtle Street	\$269,466	\$238,226.00	3686005

PART D. MONITORING

Waltham Housing staff annually monitors all HOME-funded housing developments to ensure compliance with federal, state, and local standards. Monitoring includes both review of compliance reports and site visits that include property inspections and tenant file review. Each year the Housing Division conducts HQS on HOME assisted rental units. In FY15, 125 affordable units were monitored. Waltham Housing staff annually monitors all HOME-funded housing developments to ensure compliance with federal, state, and local standards. HUD requires the City to ensure that all HUD-funded housing projects comply with federal guidelines and restrictions under HOME Program regulations at 24 CFR Part 92.

2015 HOME Monitoring included 43 HOME rental units and nine HOME-assisted homebuyer rental units. Housing Division staff also monitors the 73 Downpayment Assistance homeowners for Primary Residency compliance. The City monitors verification of tenant income, rent limits, lease compliance, and HQS inspections. The results of the monitoring activities are as follows:

- 73 Homebuyer properties monitored for loan deferments to ensure the properties are the primary residence of the HOME loan recipient and property insurance binders are updated. There have been no issues related to the primary residence requirement of the HOME loan or insurance documentation on current outstanding loans.
- One homebuyer rental property owner has corrected all deficiencies and is no longer non-compliant with HOME requirements as noted in the 2014 monitoring.
- The Housing Division provides technical assistance to WATCH in an effort to address a poor past monitoring record with WATCH. 2015 monitoring found that WATCH has greatly improved its monitoring efforts, which includes the proper documentation of income determinations, inspection reports, proper notification to tenants, and use of a lease that is free of all HOME-prohibited provisions. The Housing Division will continue to provide assistance to WATCH.

PART E. DISPLACEMENT AND RELOCATION

Uniform Relocation Act (URA) requirements apply to HUD-provided grants, loans, or contributions, including HOME, CDBG, or Section 108 loan guarantees. It is the policy of the City of Waltham to take all reasonable steps to minimize displacement as a result of CDBG and HOME-assisted projects. There were no instances of displacement associated with any CDBG or HOME Loans in Waltham in FY15.

PART F. STATUS OF LOANS

The City has administered 118 interest-free deferred loans to low- and moderate-income buyers since 1995. The outstanding HOME loan balance as of July 15, 2014 is \$2,759,301.50 (73 loans total).

To date, 40 loans totaling \$1,102,640.23 have been repaid, providing program income to fund new HOME deferred loans. In addition, the City has granted \$335,176 in HOME lead abatement grants to downpayment assistance buyers.

PART G. ANNUAL PERFORMANCE REPORT:

	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
Myrtle Street			
Renter households	16	0	16
Owner households			
Winchester Crane			
Renter households	30	0	30
Owner households			

Minority Owned Businesses						
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non- Hispanic	Hispanic	White non- Hispanic
Number of contracts	0	--	--	--	--	--
Dollar amount of contracts	0	--	--	--	--	--
Number of sub- contracts	--	--	--	--	--	--
Dollar Amount of sub-contracts	--	--	--	--	--	--

Women Owned Businesses			
	Total	Women Owned	Male Owned
Number of contracts	0	--	--
Dollar amount of contracts	0	--	--
Number of sub- contracts	0	--	--
Dollar Amount of sub-contracts	0	--	--

WATERTOWN

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES - OVERALL

Based on Watertown’s FY2015 Annual Action Plan, the only HOME Project active in FY2015 was St. Joseph Hall, which was closed out of IDIS in March, 2015. No new HOME Projects have been started in or by Watertown since the St. Joseph Hall project was closed out of IDIS. Watertown does not anticipate any construction or rehabilitation projects using HOME funds in the upcoming budget year.

Project	Budget	Contract Amount	Home Units	Total Units	HOME funds expended in FY15	Project Status
St. Joseph Hall (Rosary Drive)	\$666,641	\$666,641	7 5 @ 60% AMI 2 @ 50% AMI	25	\$206,595.08 (Final drawdown completed in March 2015)	Project construction completed December 2013. Occupancy in January 2014. Closed out of IDIS in March, 2015

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES – PUBLIC HOUSING

According to Brian Costello, Executive Director of the Watertown Housing Authority (WHA), the WHA is one of five Public Housing Authorities in Massachusetts participating in DHCD’s MassLEAP program. MassLEAP (Learning, Employment and Asset Program) is a state funded pilot that began in August 2014. The program offers services to increase the economic stability and incomes of residents in state public housing family developments and/or MRVP households.

The service provider involved with the WHA is Crittenton Women’s Union (CWU). CWU provides targeted supports in (1) post-secondary education, (2) financial literacy/asset development and (3) employment and career development. Participants develop plans and work to meet plan goals over the 5-year program. All rent increases due to increases in the earned income of participant are put into an escrow account (up to \$ 15,000.). Currently, the WHA has 19 residents enrolled and 9 more in the process of enrollment with the program and CWU.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES – AFFIRMATIVE MARKETING

Watertown did not have an active HOME-assisted project in FY 2015, other than St. Joseph Hall, which was closed out of IDIS in March (See Part A1). As such, other than the planning and citizen participation process covered under Part C, below, Watertown did not undertake specific affirmative marketing or outreach actions to Minority and Women-owned businesses in FY2015.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES – IMPEDIMENTS TO FAIR HOUSING

- Watertown’s 2013 AI was reviewed with the Town Council
- Zoning Amendments approved that will increase density by allowing or requiring mixed use

- Zoning Amendments approved that decrease the amount of parking required for multi-family and mixed use
- Design Guidelines approved for larger projects (4+ units, mixed use, and > 10,000 square feet) that strongly encourage Universal Design as part of building's exterior and interiors
- Watertown's Housing Partnership is investigating possibility of de-leading programs
- Section 5.07(6)(j) of Watertown's Zoning Ordinance (Inclusionary Zoning requirements) already provides density incentives for projects that provide rental or homeownership units that are affordable to persons with incomes at 65% of Area Median Income and 70% of Area Median Income, respectively. The Ordinance language amounts to a 15% density bonus.
- Successfully encouraged private developers to include accessible and visitable units
- Successfully encouraged 2 private developers to include 3-bedroom affordable units in their projects
- Continue to work with Metro West Collaborative Development to develop affordable units

One minority member was appointed to the Zoning Board of Appeals.

To help ensure the Watertown's compliance with the Federal Fair Housing Act and the Americans with Disabilities Act, the Town has implemented a new permit application process to streamline the review and permitting of a reasonable accommodation requests. This permit process is handled through the Building and Zoning Enforcement Departments.

In addition, Watertown's Senior Planner answered questions from individuals seeking rental housing in Watertown, who were put in contact with service providers, and notified of any current lotteries for affordable housing in private developments.

Watertown's Fair Housing Complaints Procedure directs the Senior Planner to ask the caller if it would be possible to document basic information about the complaint, and refer them to the Massachusetts Commission Against Discrimination. In FY 2015, Watertown's Senior Planner referred two individuals with Fair Housing issues to the Massachusetts Commission Against Discrimination.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES – PERSONS LIVING BELOW POVERTY LEVEL

Watertown's Senior Planner referred two homeless individuals to the Social Services Specialist at Wayside Youth and Family for housing assistance and other services.

The main barrier to making progress in Watertown is the high cost of housing and limited resources to address this need, and the lack of available Section 8 Vouchers.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES – ENERGY STAR UNITS

Watertown did not use HOME funds to construct or rehabilitate any housing units in FY 2015.

PART B. LEVERAGING

Watertown did not use any additional HUD/HOME funds for projects completed in FY2015. Only one project was completed in FY2015: St. Joseph Hall. (*See above, Part A1*) It leveraged \$4,796,163 in public and private resources during its rehabilitation and completion.

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

Watertown, through the Housing Partnership, held 13 public meetings to discuss topics related to the HOME program in FY 2015. In addition, the Housing Partnership held two special meetings (including newspaper ads and a mailing to various community groups and social service agencies) to solicit citizen participation concerning the Five Year Consortium Consolidated Plan and an update of its Consortium Consolidated Plan Citizen Participation Plan and a new Capital Improvements Policy.

The Watertown Housing Partnership includes the Watertown Housing Authority’s Executive Director, Senior Vice President of the Watertown Saving Bank, a realtor and a retired judge.

Describe actions taken during the last year to overcome gaps in institutional structure and enhance coordination.

- The Watertown Housing Partnership continued to partner with Cambridge Neighborhood Apartment Housing Services to provide foreclosure prevention counseling to Watertown homeowners at risk of foreclosure.
- The Town continued to support and partner with its local CHDO, MetroWest Collaborative Development by participating in the Ready Renter/Ready Buyer Program.
- As noted above in Part A5, Watertown supported the Social Services Resource Specialist at Wayside Youth and Family who helped connect at least two Watertown residents with needed resources and services.¹
- The Town’s Community Development and Planning Department coordinated with the Town’s Health Department to identify two residents in need of de-leading services.

PART D. MONITORING

Watertown contracted with MetroWest Collaborative Development to conduct monitoring of Inclusionary Zoning Units as well as some HOME-assisted units. Fine Point conducted monitoring of two HOME assisted projects, St. Joseph Hall and 1060 Belmont Street, on behalf of the Consortium.

Project Name	Method Created (Inclusionary Zoning or by HOME Funds)	Total Number of Affordable Units and Type
Charles River Towers	Inclusionary zoning	One Rental Unit
Nally Estates	Inclusionary zoning	Two Rental Units
Riverbank Lofts	Inclusionary zoning	Seven Ownership Units
Watertown Square (Archstone)	Inclusionary zoning	13 Rental Units ²
Charlesbank Residences	Inclusionary zoning	4 Rental Units
Riverbend on the Charles	Inclusionary zoning	17 Rental Units
Marshall Place	HOME Funding for 3 units	10 Rental Units
Coolidge School	HOME Funding for 4 units	15 Rental Units
Brigham House	HOME Funding for 15 units	42 Rental Units
Beaverbrook at Irving Street	MassHousing (?)	14 Units

¹ Andrea Adams, Senior Planner, prepared the responses for this CAPER. As such, I know of at least two people assisted by the Social Services Resource Specialist at Wayside Youth and Family because I made the referrals. However, it’s a confidential call-in or walk-in service, so there may have been more Watertown residents assisted during FY 2015.

² Watertown Square / Archstone is a unique affordable housing project. It has 7 Section 8 voucher units and 6 units at 90% AMI.

Arsenal Apartments	HUD contract renewed until 2033	156 Rental Units
St. Joseph Hall (<i>By Fine Point</i>)	HOME Funding and other sources	25 Rental Units
1060 Belmont Street (<i>By Fine Point</i>)	HOME Funding for 2 units	18 Rental Units

Project Name	Method Created (Inclusionary Zoning or by HOME Funds)	Findings of Monitoring
Charles River Towers	Inclusionary zoning	Tenants recertified in February 2015
Nally Estates	Inclusionary zoning	Tenants recertified in November 2014
Riverbank Lofts	Inclusionary zoning	Self-Certifications
Watertown Square (Archstone)	Inclusionary zoning	Eligibility determinations for 90% units and Section 8 files in good order
Charlesbank Residences	Inclusionary zoning	Tenants recertified in Fall 2014
Riverbend on the Charles	Inclusionary zoning	Tenants recertified throughout 2014
Marshall Place	HOME Funding for 3 units	Units reviewed periodically by DHCD
Coolidge School	HOME Funding for 4 units	Reviewed by DHCD in November 2014. No issues.
Brigham House	HOME Funding for 15 units	Reviewed by DHCD in July 2014. No issues.
Beaverbrook at Irving Street	MassHousing (?)	Unknown
Arsenal Apartments	HUD contract renewed until 2033	All units are project-based vouchers
St. Joseph Hall (<i>By FinePoint</i>)	HOME Funding and other sources	Rent for one unit exceeded allowable rents. Cash flow balances reviewed.
1060 Belmont Street (<i>By FinePoint</i>)	HOME Funding for 2 units	Rent for one unit exceeded allowable rents. Reserve account balances reviewed.

PART E. DISPLACEMENT AND RELOCATION

The only HOME-funded project active in FY2015 was St. Joseph Hall, and there was no displacement relating to or resulting from this project.

PART F. STATUS OF LOANS

Rental Housing:

1060 Belmont St: \$760,110.90 outstanding deferred and forgivable loan

Brigham House: \$250,000 outstanding deferred loan

Coolidge School: \$390,000 outstanding deferred and forgivable loan

St. Joseph Hall: \$666,641 outstanding deferred loan (*Active FY15; IDIS closed out March 2015*)

First Time Homebuyer Loans:

At the close of FY15, there were 16 outstanding deferred loans totaling \$533,641. Of these homeowners, one was in the process of foreclosure and one was in bankruptcy in FY2015.

PART G. ANNUAL PERFORMANCE REPORT

Project and Household Type	Very Low Income (At or below 50% AMI)	Low Income (51%-80% AMI)	Total
St. Joseph Hall			
Renter households	2	5	7
Owner households	0	0	0

Minority Owned Business Enterprises						
	Total	Alaskan Native/ American Indian	Asian / Pacific Islander	Black, Non-Hispanic	Hispanic	White, Non-Hispanic
# Contracts	1					1
Value of Contracts	\$2,320,000					\$2,320,000
# of Sub-contracts	10	1		1	2	6
Value of Sub-contracts	\$1,271,192	\$185,775		\$149,797	\$184,077	\$751,543

The only active HOME project in FY2015 was St. Joseph Hall.

Women Owned Businesses (Compared to Male Owned Businesses)			
	Total	Women Owned	Male Owned
Number of contracts	1	0	1
Dollar amount of contracts	\$2,320,000	0	\$2,320,000
Number of sub-contracts	10	0	10
Dollar Amount of sub-contracts	\$1,271,192	0	\$1,271,192

Note: The 11 shown in the WOB Table includes all the subcontractors from the MOB Table above.

Minority Owners of Rental Property						
	Minority Property Owners					
	Total	Alaskan Native or American Indian	Asian or Pacific Islander	Black non-Hispanic	Hispanic	White non-Hispanic
# of Owners	--	--	--	--	--	--
\$ HOME Funds	--	--	--	--	--	--

TOWN OF WAYLAND

PART A1. ASSESSMENT OF GOALS AND OBJECTIVES

Priority #1: Housing needs of small family homeowners with incomes less than 80 percent of AMI.

Priority #2: Housing needs of first-time homeowners between 51 and 80 percent of AMI.

Priority #3: Housing needs of small family renters with incomes between 0 and 30 percent of AMI.

The Town of Wayland officially joined the WestMetro HOME Consortium in 2010 and established its opening priorities for the program in the FY11 Annual Action Plan. The Town of Wayland, as a new member of the Consortium, is properly building up its HOME funds and will continue to assemble adequate funding to begin work on its priorities as listed above. The following items are components of Wayland's plans for affordable housing in the Town:

Creation of an Affordable Trust

During the spring 2014 Annual Town Meeting, the Town of Wayland voted to create and adopt an Affordable Housing Trust. The purpose of the Trust shall be to assist the Town of Wayland in creating and preserving affordable housing for the benefit of low- and moderate-income households, and to support the activities of the Wayland Housing Partnership and the Housing Authority through grants of real and personal property.

Route 20 Town-owned Land for Study and Potential Sale

During the spring 2014 Annual Town meeting, the Town of Wayland voted to adopt a River's Edge Housing Overlay district that would permit the construction of 190 multifamily housing units on the Town of Wayland former Septage site. It was also voted to dispose of said property which will be either sold or leased to a qualified private developer. On May 19, 2014 the Board of Selectmen established a River's Edge Advisory Committee (REAC). In FY15, following the rezoning of the site the committee worked on developing a Request for Proposals (RFP) to sell the River's Edge Wayland site, an approx. 8-acre parcel on Route 20.

The site represents an extraordinary opportunity in Wayland: the land has zoning in place for 150 to 190 units, with 2-4 story buildings, a density not seen before in town. In FY16 the Town of Wayland is due to release its Request for Proposals (RFP) to sell River's Edge Wayland, an approx. 8-acre parcel on Route 20. The Town will be requiring detailed proposals and qualifications from bidders to be able to make an informed selection. Wayland is aiming to secure the most advantageous financial benefits for the Town, however the review will be qualitative as well as quantitative. Proposals must be minimum 25% affordable, and minimum 25% senior (each equally distributed), however up to 100% in each category could be allowed for non-profit developers or senior housing developers to join in the bidding. Wayland will be looking for the best combination of up front land value, design, quality of community, fit with Wayland, and long-term tax revenues.

PART A2. ASSESSMENT OF GOALS AND OBJECTIVES - PUBLIC HOUSING

The Town of Wayland has an excellent working relationship with the Wayland Housing authority (WHA), which oversees the affordable housing rental units and ownership units in the community. Brian Boggia, the Director of the Authority, has been doing this work for 28 years. The Town regularly refers individuals interested in affordable housing to the WHA, and will continue to serve as an

educational and marketing role whenever possible. Mr. Boggia also sits on many committees throughout town.

PART A3. ASSESSMENT OF GOALS AND OBJECTIVES - AFFIRMATIVE MARKETING

The Town of Wayland has implemented a marketing plan for 40B development housing and Town Center rental housing that has been approved. No units were built with HOME funds.

The Wayland Housing Authority has been designated as the Lottery Agent to conduct the affordable housing lottery for the 12 affordable rental units developed by KGI Properties, LLC, as part of a mixed-use project in Wayland Town Center. The WHA will prepare the Tenant Selection/Marketing Plan, which will include the elements of the tenant selection process, an affirmative marketing plan, and the local preference requirements. The Tenant Selection Plan will also consider any necessary requirements or the layering of subsidies.

PART A4. ASSESSMENT OF GOALS AND OBJECTIVES - IMPEDIMENTS TO FAIR HOUSING

Wayland was one of the first communities in the State to establish a Fair Housing Committee, which was founded in 1957. The duties of the Fair Housing Committee are now under the Wayland Housing Authority and the Wayland Housing Partnership. Wayland's Fair Housing Policy is to facilitate a harmonious environment where people regardless of race, color, national origin, ancestry, age, income, sex, or handicap can be assured of housing that enhances the quality of life of all residents. The Town of Wayland will encourage:

- A variety of housing;
- Integration of diverse needs and lifestyles; and
- Participation by realtors, the banking community, developers, and neighborhoods to work cooperatively to achieve these ends.

Outreach and education are significant components of reducing barriers to fair housing, as well as new production initiatives to create more units. The Wayland Housing Partnership, the Planning Board, Community Preservation Committee, and the Board of Selectmen are working together to implement these actions to remove impediments to fair housing.

PART A5. ASSESSMENT OF GOALS AND OBJECTIVES - PERSONS LIVING BELOW POVERTY LEVEL

In 2000, the Census found that the Town of Wayland had 383 households (or 8.3 percent of all households) with annual incomes of less than \$25,000. In the same year, there were 77 families and 322 individuals who were living below the poverty level, which was set at \$10,850 for an individual and \$18,310 for a three-person household. While there are no updated figures available, it is likely that the financial situations of these residents may not have improved substantially and some may have been forced to relocate given economic circumstances since 2000.

PART A6. ASSESSMENT OF GOALS AND OBJECTIVES - ENERGY STAR UNITS

The Habitat Project is required to meet the building stretch code that was adopted in Wayland in 2011. The Habitat Project is under construction and the first unit should be completed by the fall of 2014.

PART B. LEVERAGING: N/A

PART C. CITIZEN PARTICIPATION, INSTITUTIONAL STRUCTURE, DISTRIBUTION OF EXPENDITURES

The Wayland Housing Partnership is working on the development of several Habitat for Humanity units within the Town. This project has involved significant public outreach. The Town of Wayland is working constantly to improve communication, both between Town Departments and with the private and public organizations in the community.

On May 19, 2014 the Board of Selectmen established a River's Edge Advisory Committee (REAC) as a temporary advisory committee to review bids received by the Town of Wayland as a result of a public Request for proposals (RFP) bid process for the River's Edge site (484-490 Boston Post Road), and to advise the Board of Selectmen with a recommendation(s) for the best bid(s) for the Town of Wayland.

By vote of Town Meeting, the Committee shall be comprised of nine (9) voting members appointed by and serving at the pleasure of the Board of Selectmen, with seven (7) appointees to be members of and designated (one each) by the following committees and boards: Board of Selectmen, Finance Committee, Board of Public Works, Wayland Housing Partnership, Planning Board, Design Review Board, Council of Aging, and Economic Development and two (2) citizens of the Town for at large positions. The purpose of the committee is to provide the Board of Selectmen with a recommendation to the River's Edge project bids prior to disposition of said parcels.

PART D. MONITORING: N/A

PART E. DISPLACEMENT AND RELOCATION: N/A

PART F. STATUS OF LOANS: N/A

PART G. ANNUAL PERFORMANCE REPORT: N/A

PART III
APPENDIX

PUBLIC WRITTEN COMMENTS

No public written comments on the FY15 Consolidated Annual Performance Evaluation Report for the City of Newton & WestMetro HOME Consortium were received during the comment period.



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 1

PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	1,091,487.86
02 ENTITLEMENT GRANT	1,789,510.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	177,474.74
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 RETURNS	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	3,058,472.60

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	1,030,840.32
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	1,030,840.32
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	376,182.16
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	1,407,022.48
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,651,450.12

PART III: LOWMOD BENEFIT THIS REPORTING PERIOD

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	104,074.58
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	926,765.74
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	1,030,840.32
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: PY: PY:
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	0.00
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	300,758.86
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	29,330.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	330,088.86
32 ENTITLEMENT GRANT	1,789,510.00
33 PRIOR YEAR PROGRAM INCOME	424,172.38
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	2,213,682.38
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	14.91%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	376,182.16
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	376,182.16
42 ENTITLEMENT GRANT	1,789,510.00
43 CURRENT YEAR PROGRAM INCOME	177,474.74
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	1,966,984.74
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	19.12%



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 2

LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17

Report returned no data.

LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18

Plan Year	IDIS Project	IDIS Activity	Activity Name	Matrix Code	National Objective	Drawn Amount
2013	17	3148	82 Lincoln Street	14B	LMH	\$5,450.00
2014	6	3218	Myrtle Village (12, 18-20 Curve Street)	14B	LMH	\$70,483.26
2014	7	3205	13-15 Wiltshire	14B	LMH	\$23,190.00
				14B	Matrix Code	\$99,123.26
2012	16	3034	54 Eddy Street	14G	LMH	\$4,951.32
				14G	Matrix Code	\$4,951.32
Total						\$104,074.58

LINE 19 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 19

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2008	7	2410	5826569	LOWELL PARK AREA IMPROVEMENTS	03F	LMA	\$1,099.99
2013	5	3087	5751046	Pellegrini Park Improvements	03F	LMA	\$4,635.81
					03F	Matrix Code	\$5,735.80
2009	7	2623	5725674	NEWTON CORNER PEDESTRIAN SAFETY IMPROVEMENTS	03K	LMA	\$2,856.70
2009	7	2623	5738112	NEWTON CORNER PEDESTRIAN SAFETY IMPROVEMENTS	03K	LMA	\$13,873.78
2009	7	2623	5743453	NEWTON CORNER PEDESTRIAN SAFETY IMPROVEMENTS	03K	LMA	\$576.00
2009	7	2623	5758470	NEWTON CORNER PEDESTRIAN SAFETY IMPROVEMENTS	03K	LMA	\$475.20
2012	3	3044	5745014	Newton Centre Curb Cut and Sidewalk Improvements	03K	LMC	\$0.01
					03K	Matrix Code	\$17,781.69
2011	4	2934	5817377	Commonwealth & Washington	03L	LMC	\$649.14
					03L	Matrix Code	\$649.14
2014	3	3167	5761190	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$500.00
2014	3	3167	5764040	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$300.00
2014	3	3167	5771593	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$380.00
2014	3	3167	5787020	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$280.00
2014	3	3167	5793278	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$380.00
2014	3	3167	5805951	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$730.00
2014	3	3167	5814948	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$670.00
2014	3	3167	5824360	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$852.00
2014	3	3168	5761190	NCSC - The Parents Program	05	LMC	\$12,420.00
2014	3	3168	5764040	NCSC - The Parents Program	05	LMC	\$2,460.00
2014	3	3168	5771593	NCSC - The Parents Program	05	LMC	\$2,497.50
2014	3	3168	5787020	NCSC - The Parents Program	05	LMC	\$2,197.50
2014	3	3168	5793278	NCSC - The Parents Program	05	LMC	\$2,175.00
2014	3	3168	5805951	NCSC - The Parents Program	05	LMC	\$1,953.00
2014	3	3171	5771593	Newton Housing Authority- Resident Services Coordinator	05	LMC	\$6,435.00
2014	3	3171	5824360	Newton Housing Authority- Resident Services Coordinator	05	LMC	\$6,217.00
					05	Matrix Code	\$40,447.00
2014	3	3163	5758692	Jewish Community Housing for the Elderly- Caring Choices	05A	LMC	\$6,845.71
2014	3	3163	5793278	Jewish Community Housing for the Elderly- Caring Choices	05A	LMC	\$3,249.29
2014	3	3165	5756986	NCDF Resident Services Program	05A	LMC	\$13,176.14
2014	3	3165	5793278	NCDF Resident Services Program	05A	LMC	\$6,296.86
2014	3	3169	5777434	Newton Senior Center Program Coordinator	05A	LMC	\$5,421.60
2014	3	3169	5817183	Newton Senior Center Program Coordinator	05A	LMC	\$4,435.76
2014	3	3169	5824352	Newton Senior Center Program Coordinator	05A	LMC	\$7,762.64
2014	3	3170	5777434	Newton Senior Services Department- Social Services Program	05A	LMC	\$12,288.90
2014	3	3170	5817183	Newton Senior Services Department- Social Services Program	05A	LMC	\$4,096.40



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 3

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	3	3170	5824352	Newton Senior Services Department- Social Services Program	05A	LMC	\$8,192.70
					05A	Matrix Code	\$71,766.00
2014	3	3155	5740037	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$5,369.52
2014	3	3155	5743508	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$3,053.88
2014	3	3155	5752795	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$4,284.28
2014	3	3155	5765409	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$2,866.32
2014	3	3156	5752795	Barry Price Center- Person Centered Planning	05B	LMC	\$972.86
2014	3	3156	5771593	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5780464	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5787020	Barry Price Center- Person Centered Planning	05B	LMC	\$243.21
2014	3	3156	5791770	Barry Price Center- Person Centered Planning	05B	LMC	\$250.37
2014	3	3156	5805951	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5814948	Barry Price Center- Person Centered Planning	05B	LMC	\$343.36
2014	3	3156	5820771	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5824360	Barry Price Center- Person Centered Planning	05B	LMC	\$218.56
2014	3	3161	5824360	Charles River Center- Children's Program Scholarships	05B	LMC	\$1,356.00
2014	3	3162	5820771	Charles River Center- Music Therapy	05B	LMC	\$3,041.00
2014	3	3174	5765409	NWW Committee- Clinical Services and Supports	05B	LMC	\$1,988.56
2014	3	3174	5771593	NWW Committee- Clinical Services and Supports	05B	LMC	\$1,704.48
2014	3	3174	5802191	NWW Committee- Clinical Services and Supports	05B	LMC	\$1,627.96
2014	3	3175	5765409	NWW Committee- Community Access	05B	LMC	\$1,375.84
2014	3	3175	5771593	NWW Committee- Community Access	05B	LMC	\$1,870.00
2014	3	3175	5805951	NWW Committee- Community Access	05B	LMC	\$1,341.16
2014	3	3176	5765409	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$807.23
2014	3	3176	5780464	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$1,362.69
2014	3	3176	5805951	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$523.39
2014	3	3176	5824360	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$2,302.69
					05B	Matrix Code	\$37,819.00
2014	3	3160	5756986	Boys and Girls Club- Teen Programming	05D	LMC	\$4,490.00
2014	3	3172	5777434	Newton Health and Human Services - Youth Outreach Program	05D	LMC	\$14,494.00
2014	3	3180	5747454	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$925.00
2014	3	3180	5771593	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$1,800.00
2014	3	3180	5780464	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$787.50
2014	3	3180	5824360	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$750.50
2014	3	3183	5752795	West Suburban YMCA/The Teen Center	05D	LMC	\$3,905.40
2014	3	3183	5756986	West Suburban YMCA/The Teen Center	05D	LMC	\$885.55
2014	3	3183	5764040	West Suburban YMCA/The Teen Center	05D	LMC	\$2,772.80
2014	3	3183	5791770	West Suburban YMCA/The Teen Center	05D	LMC	\$3,445.34
2014	3	3183	5793278	West Suburban YMCA/The Teen Center	05D	LMC	\$1,590.79
2014	3	3183	5802191	West Suburban YMCA/The Teen Center	05D	LMC	\$1,853.73
2014	3	3183	5814948	West Suburban YMCA/The Teen Center	05D	LMC	\$13,982.43
2014	3	3183	5818342	West Suburban YMCA/The Teen Center	05D	LMC	\$3,092.84
2014	3	3183	5824360	West Suburban YMCA/The Teen Center	05D	LMC	\$1,615.98
					05D	Matrix Code	\$56,391.86
2014	3	3179	5743508	REACH- Individual Support and Advocacy	05G	LMC	\$1,395.00
2014	3	3179	5780464	REACH- Individual Support and Advocacy	05G	LMC	\$1,552.50
2014	3	3179	5805951	REACH- Individual Support and Advocacy	05G	LMC	\$861.50
					05G	Matrix Code	\$3,809.00
2014	3	3157	5758692	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$1,719.00
2014	3	3157	5771593	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$573.00
2014	3	3157	5805951	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$573.00
2014	3	3157	5818342	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$2,292.00
2014	3	3157	5824360	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$573.00
2014	3	3158	5756986	Boys & Girls Club- Camp Scholarships	05L	LMC	\$2,274.00
2014	3	3159	5771593	Boys and Girls Club- Kids Corp Scholarships	05L	LMC	\$1,430.00



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 4

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	3	3159	5802191	Boys and Girls Club- Kids Corp Scholarships	05L	LMC	\$1,500.00
2014	3	3159	5824360	Boys and Girls Club- Kids Corp Scholarships	05L	LMC	\$1,560.00
2014	3	3164	5780464	The Newton Partnership, Inc. - Child Care Scholarship Fund	05L	LMC	\$5,651.00
2014	3	3164	5805951	The Newton Partnership, Inc. - Child Care Scholarship Fund	05L	LMC	\$3,700.00
2014	3	3164	5818342	The Newton Partnership, Inc. - Child Care Scholarship Fund	05L	LMC	\$2,120.00
2014	3	3166	5761190	NCSC- Child Care Scholarships	05L	LMC	\$2,734.50
2014	3	3166	5771593	NCSC- Child Care Scholarships	05L	LMC	\$678.50
2014	3	3166	5787020	NCSC- Child Care Scholarships	05L	LMC	\$550.00
2014	3	3166	5793278	NCSC- Child Care Scholarships	05L	LMC	\$500.00
2014	3	3166	5802191	NCSC- Child Care Scholarships	05L	LMC	\$1,534.00
2014	3	3166	5814948	NCSC- Child Care Scholarships	05L	LMC	\$3,465.00
2014	3	3166	5820771	NCSC- Child Care Scholarships	05L	LMC	\$6,112.00
2014	3	3173	5765410	Newton Parks and Recreation - Summer Camp Scholarships	05L	LMC	\$2,268.00
2014	3	3177	5751046	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5758692	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5761190	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5771593	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5787020	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5791770	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5802191	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5820771	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$1,498.80
2014	3	3177	5824360	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$1,200.00
2014	3	3178	5758692	Plowshares Tuition Assistance Program	05L	LMC	\$1,917.00
2014	3	3178	5793278	Plowshares Tuition Assistance Program	05L	LMC	\$2,811.25
2014	3	3178	5814948	Plowshares Tuition Assistance Program	05L	LMC	\$1,495.50
2014	3	3178	5820771	Plowshares Tuition Assistance Program	05L	LMC	\$5,247.25
					05L	Matrix Code	\$59,474.00
2014	3	3181	5747454	Riverside Community Care- Mental Health and Substance Abuse Recovery	05O	LMC	\$7,450.00
2014	3	3181	5824360	Riverside Community Care- Mental Health and Substance Abuse Recovery	05O	LMC	\$10,170.00
					05O	Matrix Code	\$17,620.00
2014	3	3182	5771593	Horace Cousens Industrial Fund	05Q	LMC	\$11,166.72
2014	3	3182	5817183	Horace Cousens Industrial Fund	05Q	LMC	\$2,265.28
					05Q	Matrix Code	\$13,432.00
2011	2	2941	5734841	111 Waban Hill Road	14A	LMH	\$12,263.21
2012	11	3029	5751054	40-42 Oak Avenue	14A	LMH	\$12,950.00
2012	11	3039	5743402	10 Colonial Ave	14A	LMH	\$2,500.00
2013	6	3141	5725208	21 Foster Street	14A	LMH	\$36,165.79
2013	6	3141	5734841	21 Foster Street	14A	LMH	\$21,850.00
2013	6	3149	5743402	15 Bank Street	14A	LMH	\$4,812.64
2013	7	3145	5734841	1138 Boylston Street	14A	LMH	\$175.00
2013	7	3145	5765411	1138 Boylston Street	14A	LMH	\$250.00
2013	7	3145	5775912	1138 Boylston Street	14A	LMH	\$14,645.00
2013	7	3145	5787079	1138 Boylston Street	14A	LMH	\$33,191.16
2013	7	3145	5802201	1138 Boylston Street	14A	LMH	\$30,180.00
2013	7	3145	5820095	1138 Boylston Street	14A	LMH	\$5,870.00
2013	7	3147	5761199	184 East Side Parkway	14A	LMH	\$15,700.00
2013	7	3147	5802318	184 East Side Parkway	14A	LMH	\$28,115.00
2013	7	3147	5809635	184 East Side Parkway	14A	LMH	\$195.00
2013	7	3147	5820095	184 East Side Parkway	14A	LMH	\$3,548.00
2013	17	3108	5725206	68-70 Cottage Street	14A	LMH	\$250.00
2013	17	3143	5725206	467 California Street	14A	LMH	\$28,740.00
2013	17	3143	5734841	467 California Street	14A	LMH	\$5,818.73
2014	6	3216	5765411	159 Charlesbank	14A	LMH	\$590.00
2014	6	3216	5793175	159 Charlesbank	14A	LMH	\$175.00
2014	6	3216	5809635	159 Charlesbank	14A	LMH	\$6,655.00



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 5

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	6	3216	5820095	159 Charlesbank	14A	LMH	\$71,410.00
2014	6	3216	5824355	159 Charlesbank	14A	LMH	\$3,250.00
2014	6	3222	5802318	20 Summer Street	14A	LMH	\$485.00
					14A	Matrix Code	\$339,784.53
2014	5	3150	5725202	Housing Program Delivery	14H	LMH	\$54,785.83
2014	5	3150	5725211	Housing Program Delivery	14H	LMH	\$12,215.33
2014	5	3150	5725212	Housing Program Delivery	14H	LMH	\$12,223.67
2014	5	3150	5725672	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5726125	Housing Program Delivery	14H	LMH	\$4,075.01
2014	5	3150	5727564	Housing Program Delivery	14H	LMH	\$3,254.53
2014	5	3150	5734829	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5734832	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5736120	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5736171	Housing Program Delivery	14H	LMH	\$4,075.01
2014	5	3150	5740036	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5743396	Housing Program Delivery	14H	LMH	\$4,075.12
2014	5	3150	5743402	Housing Program Delivery	14H	LMH	\$75.00
2014	5	3150	5743630	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5744885	Housing Program Delivery	14H	LMH	\$415.00
2014	5	3150	5746211	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5750980	Housing Program Delivery	14H	LMH	\$4,114.67
2014	5	3150	5750991	Housing Program Delivery	14H	LMH	\$4,110.02
2014	5	3150	5752795	Housing Program Delivery	14H	LMH	\$350.00
2014	5	3150	5756973	Housing Program Delivery	14H	LMH	\$3,989.19
2014	5	3150	5757171	Housing Program Delivery	14H	LMH	\$5,084.85
2014	5	3150	5757660	Housing Program Delivery	14H	LMH	\$4,957.91
2014	5	3150	5761209	Housing Program Delivery	14H	LMH	\$4,070.35
2014	5	3150	5764995	Housing Program Delivery	14H	LMH	\$4,014.11
2014	5	3150	5765049	Housing Program Delivery	14H	LMH	\$4,564.33
2014	5	3150	5765409	Housing Program Delivery	14H	LMH	\$1,365.00
2014	5	3150	5765410	Housing Program Delivery	14H	LMH	\$348.02
2014	5	3150	5771582	Housing Program Delivery	14H	LMH	\$4,070.49
2014	5	3150	5772423	Housing Program Delivery	14H	LMH	\$1,312.22
2014	5	3150	5775915	Housing Program Delivery	14H	LMH	\$4,581.42
2014	5	3150	5777434	Housing Program Delivery	14H	LMH	\$1,147.64
2014	5	3150	5777436	Housing Program Delivery	14H	LMH	\$3,029.38
2014	5	3150	5784193	Housing Program Delivery	14H	LMH	\$3,024.73
2014	5	3150	5784196	Housing Program Delivery	14H	LMH	\$3,024.73
2014	5	3150	5784623	Housing Program Delivery	14H	LMH	\$4,145.56
2014	5	3150	5787020	Housing Program Delivery	14H	LMH	\$400.00
2014	5	3150	5791770	Housing Program Delivery	14H	LMH	\$334.04
2014	5	3150	5791843	Housing Program Delivery	14H	LMH	\$3,035.64
2014	5	3150	5791846	Housing Program Delivery	14H	LMH	\$4,274.73
2014	5	3150	5791849	Housing Program Delivery	14H	LMH	\$8,041.12
2014	5	3150	5802191	Housing Program Delivery	14H	LMH	\$210.00
2014	5	3150	5802229	Housing Program Delivery	14H	LMH	\$2,669.09
2014	5	3150	5805956	Housing Program Delivery	14H	LMH	\$181.63
2014	5	3150	5805958	Housing Program Delivery	14H	LMH	\$3,463.39
2014	5	3150	5812154	Housing Program Delivery	14H	LMH	\$20,558.00
2014	5	3150	5814948	Housing Program Delivery	14H	LMH	\$65.00
2014	5	3150	5815564	Housing Program Delivery	14H	LMH	\$4,043.39
2014	5	3150	5815565	Housing Program Delivery	14H	LMH	\$4,048.04
2014	5	3150	5817377	Housing Program Delivery	14H	LMH	\$4,043.39
2014	5	3150	5824350	Housing Program Delivery	14H	LMH	\$2,219.18
2014	5	3150	5824351	Housing Program Delivery	14H	LMH	\$8,655.04
2014	5	3150	5824352	Housing Program Delivery	14H	LMH	\$106.85
2014	5	3150	5824353	Housing Program Delivery	14H	LMH	\$4,048.04



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 6

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	5	3150	5824359	Housing Program Delivery	14H	LMH	\$294.00
2014	5	3150	5824360	Housing Program Delivery	14H	LMH	\$4,654.82
2014	5	3150	5824641	Housing Program Delivery	14H	LMH	\$1,617.36
2014	5	3150	5828762	Housing Program Delivery	14H	LMH	\$101.40
							\$262,055.72
Total							\$926,765.74

LINE 27 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 27

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	3	3167	5761190	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$500.00
2014	3	3167	5764040	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$300.00
2014	3	3167	5771593	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$380.00
2014	3	3167	5787020	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$280.00
2014	3	3167	5793278	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$380.00
2014	3	3167	5805951	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$730.00
2014	3	3167	5814948	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$670.00
2014	3	3167	5824360	NCSC Parent Child Home Program- Early Literacy Services	05	LMC	\$852.00
2014	3	3168	5761190	NCSC - The Parents Program	05	LMC	\$12,420.00
2014	3	3168	5764040	NCSC - The Parents Program	05	LMC	\$2,460.00
2014	3	3168	5771593	NCSC - The Parents Program	05	LMC	\$2,497.50
2014	3	3168	5787020	NCSC - The Parents Program	05	LMC	\$2,197.50
2014	3	3168	5793278	NCSC - The Parents Program	05	LMC	\$2,175.00
2014	3	3168	5805951	NCSC - The Parents Program	05	LMC	\$1,953.00
2014	3	3171	5771593	Newton Housing Authority- Resident Services Coordinator	05	LMC	\$6,435.00
2014	3	3171	5824360	Newton Housing Authority- Resident Services Coordinator	05	LMC	\$6,217.00
							\$40,447.00
2014	3	3163	5758692	Jewish Community Housing for the Elderly- Caring Choices	05A	LMC	\$6,845.71
2014	3	3163	5793278	Jewish Community Housing for the Elderly- Caring Choices	05A	LMC	\$3,249.29
2014	3	3165	5756986	NCDF Resident Services Program	05A	LMC	\$13,176.14
2014	3	3165	5793278	NCDF Resident Services Program	05A	LMC	\$6,296.86
2014	3	3169	5777434	Newton Senior Center Program Coordinator	05A	LMC	\$5,421.60
2014	3	3169	5817183	Newton Senior Center Program Coordinator	05A	LMC	\$4,435.76
2014	3	3169	5824352	Newton Senior Center Program Coordinator	05A	LMC	\$7,762.64
2014	3	3170	5777434	Newton Senior Services Department- Social Services Program	05A	LMC	\$12,288.90
2014	3	3170	5817183	Newton Senior Services Department- Social Services Program	05A	LMC	\$4,096.40
2014	3	3170	5824352	Newton Senior Services Department- Social Services Program	05A	LMC	\$8,192.70
							\$71,766.00
2014	3	3155	5740037	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$5,369.52
2014	3	3155	5743508	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$3,053.88
2014	3	3155	5752795	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$4,284.28
2014	3	3155	5765409	Barry Price Center-Job Developer and Coach	05B	LMCSV	\$2,866.32
2014	3	3156	5752795	Barry Price Center- Person Centered Planning	05B	LMC	\$972.86
2014	3	3156	5771593	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5780464	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5787020	Barry Price Center- Person Centered Planning	05B	LMC	\$243.21
2014	3	3156	5791770	Barry Price Center- Person Centered Planning	05B	LMC	\$250.37
2014	3	3156	5805951	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5814948	Barry Price Center- Person Centered Planning	05B	LMC	\$343.36
2014	3	3156	5820771	Barry Price Center- Person Centered Planning	05B	LMC	\$228.91
2014	3	3156	5824360	Barry Price Center- Person Centered Planning	05B	LMC	\$218.56
2014	3	3161	5824360	Charles River Center- Children's Program Scholarships	05B	LMC	\$1,356.00



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 7

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	3	3162	5820771	Charles River Center- Music Therapy	05B	LMC	\$3,041.00
2014	3	3174	5765409	NWW Committee- Clinical Services and Supports	05B	LMC	\$1,988.56
2014	3	3174	5771593	NWW Committee- Clinical Services and Supports	05B	LMC	\$1,704.48
2014	3	3174	5802191	NWW Committee- Clinical Services and Supports	05B	LMC	\$1,627.96
2014	3	3175	5765409	NWW Committee- Community Access	05B	LMC	\$1,375.84
2014	3	3175	5771593	NWW Committee- Community Access	05B	LMC	\$1,870.00
2014	3	3175	5805951	NWW Committee- Community Access	05B	LMC	\$1,341.16
2014	3	3176	5765409	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$807.23
2014	3	3176	5780464	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$1,362.69
2014	3	3176	5805951	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$523.39
2014	3	3176	5824360	NWW Committee- Wednesday Night Drop-In	05B	LMC	\$2,302.69
					05B	Matrix Code	\$37,819.00
2014	3	3160	5756986	Boys and Girls Club- Teen Programming	05D	LMC	\$4,490.00
2014	3	3172	5777434	Newton Health and Human Services - Youth Outreach Program	05D	LMC	\$14,494.00
2014	3	3180	5747454	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$925.00
2014	3	3180	5771593	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$1,800.00
2014	3	3180	5780464	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$787.50
2014	3	3180	5824360	Riverside Community Care- Family Crisis Stabilization	05D	LMC	\$750.50
2014	3	3183	5752795	West Suburban YMCA/The Teen Center	05D	LMC	\$3,905.40
2014	3	3183	5756986	West Suburban YMCA/The Teen Center	05D	LMC	\$885.55
2014	3	3183	5764040	West Suburban YMCA/The Teen Center	05D	LMC	\$2,772.80
2014	3	3183	5791770	West Suburban YMCA/The Teen Center	05D	LMC	\$3,445.34
2014	3	3183	5793278	West Suburban YMCA/The Teen Center	05D	LMC	\$1,590.79
2014	3	3183	5802191	West Suburban YMCA/The Teen Center	05D	LMC	\$1,853.73
2014	3	3183	5814948	West Suburban YMCA/The Teen Center	05D	LMC	\$13,982.43
2014	3	3183	5818342	West Suburban YMCA/The Teen Center	05D	LMC	\$3,092.84
2014	3	3183	5824360	West Suburban YMCA/The Teen Center	05D	LMC	\$1,615.98
					05D	Matrix Code	\$56,391.86
2014	3	3179	5743508	REACH- Individual Support and Advocacy	05G	LMC	\$1,395.00
2014	3	3179	5780464	REACH- Individual Support and Advocacy	05G	LMC	\$1,552.50
2014	3	3179	5805951	REACH- Individual Support and Advocacy	05G	LMC	\$861.50
					05G	Matrix Code	\$3,809.00
2014	3	3157	5758692	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$1,719.00
2014	3	3157	5771593	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$573.00
2014	3	3157	5805951	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$573.00
2014	3	3157	5818342	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$2,292.00
2014	3	3157	5824360	Bowen Afterschool Program-Tuition Assistance	05L	LMC	\$573.00
2014	3	3158	5756986	Boys & Girls Club- Camp Scholarships	05L	LMC	\$2,274.00
2014	3	3159	5771593	Boys and Girls Club- Kids Corp Scholarships	05L	LMC	\$1,430.00
2014	3	3159	5802191	Boys and Girls Club- Kids Corp Scholarships	05L	LMC	\$1,500.00
2014	3	3159	5824360	Boys and Girls Club- Kids Corp Scholarships	05L	LMC	\$1,560.00
2014	3	3164	5780464	The Newton Partnership, Inc. - Child Care Scholarship Fund	05L	LMC	\$5,651.00
2014	3	3164	5805951	The Newton Partnership, Inc. - Child Care Scholarship Fund	05L	LMC	\$3,700.00
2014	3	3164	5818342	The Newton Partnership, Inc. - Child Care Scholarship Fund	05L	LMC	\$2,120.00
2014	3	3166	5761190	NCSC- Child Care Scholarships	05L	LMC	\$2,734.50
2014	3	3166	5771593	NCSC- Child Care Scholarships	05L	LMC	\$678.50
2014	3	3166	5787020	NCSC- Child Care Scholarships	05L	LMC	\$550.00
2014	3	3166	5793278	NCSC- Child Care Scholarships	05L	LMC	\$500.00
2014	3	3166	5802191	NCSC- Child Care Scholarships	05L	LMC	\$1,534.00
2014	3	3166	5814948	NCSC- Child Care Scholarships	05L	LMC	\$3,465.00
2014	3	3166	5820771	NCSC- Child Care Scholarships	05L	LMC	\$6,112.00
2014	3	3173	5765410	Newton Parks and Recreation - Summer Camp Scholarships	05L	LMC	\$2,268.00
2014	3	3177	5751046	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5758692	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5761190	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5771593	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 8

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	3	3177	5787020	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5791770	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5802191	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$499.60
2014	3	3177	5820771	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$1,498.80
2014	3	3177	5824360	Peirce Extended Day Program- Scholarship Program	05L	LMC	\$1,200.00
2014	3	3178	5758692	Plowshares Tuition Assistance Program	05L	LMC	\$1,917.00
2014	3	3178	5793278	Plowshares Tuition Assistance Program	05L	LMC	\$2,811.25
2014	3	3178	5814948	Plowshares Tuition Assistance Program	05L	LMC	\$1,495.50
2014	3	3178	5820771	Plowshares Tuition Assistance Program	05L	LMC	\$5,247.25
					05L	Matrix Code	\$59,474.00
2014	3	3181	5747454	Riverside Community Care- Mental Health and Substance Abuse Recovery	05O	LMC	\$7,450.00
2014	3	3181	5824360	Riverside Community Care- Mental Health and Substance Abuse Recovery	05O	LMC	\$10,170.00
					05O	Matrix Code	\$17,620.00
2014	3	3182	5771593	Horace Cousens Industrial Fund	05Q	LMC	\$11,166.72
2014	3	3182	5817183	Horace Cousens Industrial Fund	05Q	LMC	\$2,265.28
					05Q	Matrix Code	\$13,432.00
Total							\$300,758.86

LINE 37 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 37

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	8	3188	5725202	Program Administration	21A		\$78,956.17
2014	8	3188	5725211	Program Administration	21A		\$13,199.18
2014	8	3188	5725212	Program Administration	21A		\$16,394.97
2014	8	3188	5725672	Program Administration	21A		\$5,396.51
2014	8	3188	5726125	Program Administration	21A		\$5,414.74
2014	8	3188	5727564	Program Administration	21A		\$3,365.49
2014	8	3188	5732433	Program Administration	21A		\$314.26
2014	8	3188	5734829	Program Administration	21A		\$6,697.66
2014	8	3188	5734832	Program Administration	21A		\$7,413.37
2014	8	3188	5736120	Program Administration	21A		\$9,073.88
2014	8	3188	5736171	Program Administration	21A		\$4,644.32
2014	8	3188	5740036	Program Administration	21A		\$4,808.00
2014	8	3188	5740037	Program Administration	21A		\$831.89
2014	8	3188	5743396	Program Administration	21A		\$4,938.16
2014	8	3188	5743453	Program Administration	21A		\$452.63
2014	8	3188	5743508	Program Administration	21A		\$525.90
2014	8	3188	5743630	Program Administration	21A		\$5,368.09
2014	8	3188	5744885	Program Administration	21A		\$1,318.89
2014	8	3188	5746211	Program Administration	21A		\$5,133.35
2014	8	3188	5750980	Program Administration	21A		\$5,381.66
2014	8	3188	5750991	Program Administration	21A		\$4,898.32
2014	8	3188	5752795	Program Administration	21A		\$525.00
2014	8	3188	5756973	Program Administration	21A		\$5,133.36
2014	8	3188	5757171	Program Administration	21A		\$5,383.64
2014	8	3188	5757660	Program Administration	21A		\$6,467.52
2014	8	3188	5758470	Program Administration	21A		\$98.46
2014	8	3188	5758692	Program Administration	21A		\$247.79
2014	8	3188	5761209	Program Administration	21A		\$4,933.66
2014	8	3188	5764040	Program Administration	21A		\$247.79
2014	8	3188	5764995	Program Administration	21A		\$5,265.38
2014	8	3188	5765049	Program Administration	21A		\$4,452.27
2014	8	3188	5771582	Program Administration	21A		\$4,452.78



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2014
 NEWTON , MA

DATE: 07-31-15
 TIME: 14:09
 PAGE: 9

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2014	8	3188	5772423	Program Administration	21A		\$12,752.17
2014	8	3188	5775910	Program Administration	21A		\$247.79
2014	8	3188	5775915	Program Administration	21A		\$6,517.43
2014	8	3188	5777434	Program Administration	21A		\$4,632.52
2014	8	3188	5777436	Program Administration	21A		\$6,612.30
2014	8	3188	5784193	Program Administration	21A		\$6,733.01
2014	8	3188	5784196	Program Administration	21A		\$6,732.63
2014	8	3188	5784623	Program Administration	21A		\$6,733.02
2014	8	3188	5787020	Program Administration	21A		\$247.79
2014	8	3188	5791770	Program Administration	21A		\$500.75
2014	8	3188	5791843	Program Administration	21A		\$7,331.12
2014	8	3188	5791846	Program Administration	21A		\$6,909.80
2014	8	3188	5791849	Program Administration	21A		\$6,733.01
2014	8	3188	5802191	Program Administration	21A		\$248.82
2014	8	3188	5805951	Program Administration	21A		\$247.79
2014	8	3188	5805956	Program Administration	21A		\$12,178.81
2014	8	3188	5805958	Program Administration	21A		\$22,929.65
2014	8	3188	5809629	Program Administration	21A		\$36.72
2014	8	3188	5812154	Program Administration	21A		\$17,017.78
2014	8	3188	5814948	Program Administration	21A		\$247.79
2014	8	3188	5815564	Program Administration	21A		\$5,491.80
2014	8	3188	5815565	Program Administration	21A		\$6,800.99
2014	8	3188	5817183	Program Administration	21A		\$126.51
2014	8	3188	5817377	Program Administration	21A		\$6,133.25
2014	8	3188	5820768	Program Administration	21A		\$279.94
2014	8	3188	5824350	Program Administration	21A		\$401.26
2014	8	3188	5824351	Program Administration	21A		\$2,515.51
2014	8	3188	5824352	Program Administration	21A		\$31.99
2014	8	3188	5824353	Program Administration	21A		\$2,684.98
2014	8	3188	5824359	Program Administration	21A		\$730.97
2014	8	3188	5824360	Program Administration	21A		\$373.11
2014	8	3188	5824641	Program Administration	21A		\$2,348.28
2014	8	3188	5828762	Program Administration	21A		\$50.76
2014	8	3188	5828776	Program Administration	21A		\$23.84
2014	8	3188	5832976	Program Administration	21A		\$31.82
2014	8	3188	5833550	Program Administration	21A		\$0.03
					21A	Matrix Code	\$375,350.83
2014	8	3189	5740037	Citizen Participation	21C		\$364.12
2014	8	3189	5743508	Citizen Participation	21C		\$320.00
2014	8	3189	5805951	Citizen Participation	21C		\$147.21
					21C	Matrix Code	\$831.33
Total							\$376,182.16

HOME Match Report

U.S. Department of Housing and Urban Development Office of Community Planning and Development

OMB Approval No. 2506-0171
(exp. 05/31/2007)

Part I Participant Identification		Match Contributions for Federal Fiscal Year (yyyy) 2014	
1. Participant No. (assigned by HUD) M-14-DC-25-0213	2. Name of the Participating Jurisdiction Newton (Mass.) WestMetro Consortium	3. Name of Contact (person completing this report) Elizabeth Valenta	
5. Street Address of the Participating Jurisdiction 1000 Commonwealth Avenue		4. Contact's Phone Number (include area code) 617-796-1145	
6. City Newton	7. State MA	8. Zip Code 02459-1449	

Part II Fiscal Year Summary

1. Excess match from prior Federal fiscal year	\$	\$43,818,458.89
2. Match contributed during current Federal fiscal year (see Part III.9.)	\$	\$2,779,281.00
3. Total match available for current Federal fiscal year (line 1 + line 2)		\$46,597,739.89
4. Match liability for current Federal fiscal year		\$557,634.87
5. Excess match carried over to next Federal fiscal year (line 3 minus line 4)		\$46,040,105.02

Part III Match Contribution for the Federal Fiscal Year

1. Project No. or Other ID	2. Date of Contribution (mm/dd/yyyy)	3. Cash (non-Federal sources)	4. Foregone Taxes, Fees, Charges	5. Appraised Land / Real Property	6. Required Infrastructure	7. Site Preparation, Construction Materials Donated labor	8. Mass. Rental Voucher Program	9. Total Match
1. Belmont								
Waverly woods	FY15		49,457	5,815,000				49,457
B Street	FY15		8,429	1,091,259				8,429
Brighton Street	FY15		2,418	552,810				2,418
Oakley	FY15		14,567	1,648,002				14,567
2. BROOKLINE								
86 Dummer St.	FY15	1,893,902						1,893,902
53-57 Beals St.	FY15	206,100						206,100
MRVP	8/21/13						\$210,909	\$210,909
TOTAL Pg. 1 >>>>								2,385,782

Annual Performance Report HOME Program

U.S. Department of Housing
and Urban Development
Office of Community Planning
and Development

OMB Approval No. 2506-0171
(exp. 05/31/2007)

Public reporting burden for this collection of information is estimated to average 2.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

The HOME statute imposes a significant number of data collection and reporting requirements. This includes information on assisted properties, on the owners or tenants of the properties, and on other programmatic areas. The information will be used: 1) to assist HOME participants in managing their programs; 2) to track performance of participants in meeting fund commitment and expenditure deadlines; 3) to permit HUD to determine whether each participant meets the HOME statutory income targeting and affordability requirements; and 4) to permit HUD to determine compliance with other statutory and regulatory program requirements. This data collection is authorized under Title II of the Cranston-Gonzalez National Affordable Housing Act or related authorities. Access to Federal grant funds is contingent on the reporting of certain project-specific data elements. Records of information collected will be maintained by the recipients of the assistance. Information on activities and expenditures of grant funds is public information and is generally available for disclosure. Recipients are responsible for ensuring confidentiality when public disclosure is not required.

This form is intended to collect numeric data to be aggregated nationally as a complement to data collected through the Cash and Management Information (C/MI) System. Participants should enter the reporting period in the first block. The reporting period is October 1 to September 30. Instructions are included for each section if further explanation is needed.

Submit this form on or before December 31.	This report is for period (mm/dd/yyyy)		Date Submitted (mm/dd/yyyy)
Send one copy to the appropriate HUD Field Office and one copy to: HOME Program, Rm 7176, 451 7th Street, S.W., Washington D.C. 20410	Starting 07/01/2014	Ending 06/30/2015	09/30/2015

Part I Participant Identification

1. Participant Number M-14-DC-25-0213	2. Participant Name City of Newton & WestMetro HOME Consortium		
3. Name of Person completing this report Lydia Scott		4. Phone Number (Include Area Code) 617-796-1132	
5. Address 1000 Commonwealth Avenue	6. City Newton	7. State MA	8. Zip Code 02459-1449

Part II Program Income

Enter the following program income amounts for the reporting period: in block 1, enter the balance on hand at the beginning; in block 2, enter the amount generated; in block 3, enter the amount expended; and in block 4, enter the amount for Tenant-Based rental Assistance.

1. Balance on hand at Beginning of Reporting Period \$1,189.92	2. Amount received during Reporting Period \$406,622.93	3. Total amount expended during Reporting Period \$276,522.13	4. Amount expended for Tenant-Based Rental Assistance \$0	5. Balance on hand at end of Reporting Period (1 + 2 - 3) = 5 \$131,290.72
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Part III Minority Business Enterprises (MBE) and Women Business Enterprises (WBE)

In the table below, indicate the number and dollar value of contracts for HOME projects completed during the reporting period.

	a. Total	Minority Business Enterprises (MBE)			f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	
A. Contracts					
1. Number	6				6
2. Dollar Amount	\$2,958,295				\$2,958,295
B. Sub-Contracts					
1. Number	10	1		1	2
2. Dollar Amount	\$1,271,192	\$185,775		\$149,797	\$184,077
	a. Total	b. Women Business Enterprises (WBE)	c. Male		
C. Contracts					
1. Number	6	1	5		
2. Dollar Amount	\$2,958,295	\$101,829	\$2,856,466		
D. Sub-Contracts					
1. Number	10		10		
2. Dollar Amounts	\$1,271,192		\$1,271,192		

Part IV Minority Owners of Rental Property

In the table below, indicate the number of HOME assisted rental property owners and the total dollar amount of HOME funds in these rental properties assisted during the reporting period.

	a. Total	Minority Property Owners				f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
1. Number	3					3
2. Dollar Amount	\$99,562					\$99,562

Part V Relocation and Real Property Acquisition

Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition. The data provided should reflect only displacements and acquisitions occurring during the reporting period.

	a. Number	b. Cost
1. Parcels Acquired	0	0
2. Businesses Displaced	0	0
3. Nonprofit Organizations Displaced	0	0
4. Households Temporarily Relocated, not Displaced	0	0

Households Displaced	a. Total	Minority Business Enterprises (MBE)				f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
5. Households Displaced - Number	0	0	0	0	0	0
6. Households Displaced - Cost	0	0	0	0	0	0

CR-60 - ESG 91.520(g) (ESG Recipients only)

**ESG Supplement to the CAPER in *e-snaps*
For Paperwork Reduction Act**

1. Recipient Information—All Recipients Complete

Basic Grant Information

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

ESG Contact Name

Prefix	
First Name	Judith
Middle Name	
Last Name	Menon
Suffix	
Title	Community Development Programs Manager

ESG Contact Address

Street Address 1	1000 Commonwealth Avenue
Street Address 2	
City	Newton
State	MA
ZIP Code	02139
Phone Number	617-796-1125
Extension	
Fax Number	617-796-1142
Email Address	jmenon@newtonma.gov

ESG Secondary Contact

Prefix	
First Name	Lydia
Last Name	Scott
Suffix	
Title	Community Development Planner
Phone Number	617-796-1132
Extension	
Email Address	lscott@newtonma.gov

2. Reporting Period—All Recipients Complete

Program Year Start Date	07/01/2014
Program Year End Date	06/30/2015

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

REACH Beyond Domestic Violence, Inc.
Waltham, MA 02454 DUNS: 781777412
DV Provider, other nonprofit
\$10,751 – Emergency Shelter Services

The Second Step, Inc.
Newton, MA 02460 DUNS: 028016942
DV Provider, other nonprofit
\$24,001 – Emergency Shelter Services
\$7,500 – Homelessness Prevention

Middlesex Human Service Agency, Inc.
Waltham, MA 02453 DUNS: 170557474
No DV, other nonprofit
\$12,871 – Emergency Shelter Services

Brookline Community Mental Health Center, Inc.
Brookline, MA 02445 DUNS: 097444186
No DV, other nonprofit
\$36,644 (Amended budget: \$38,065) – Homelessness Prevention
\$14,644 (Amended budget: \$13,223) – Rapid Re-housing
\$10,000 – Street Outreach

Waltham Community Day Center
Waltham, MA 02454 DUNS: 791377612
No DV, other nonprofit
\$16,051 – Shelter Renovations

CR-65 - Persons Assisted

4. Persons Served

4a. Complete for Homelessness Prevention Activities

Number of Persons in Households	Total
Adults	46
Children	35
Don't Know/Refused/Other	0
Missing Information	0
Total	81

Table 1 – Household Information for Homeless Prevention Activities

4b. Complete for Rapid Re-Housing Activities

Number of Persons in Households	Total
Adults	9
Children	3
Don't Know/Refused/Other	0
Missing Information	0
Total	12

Table 2 – Household Information for Rapid Re-Housing Activities

4c. Complete for Shelter

Number of Persons in Households	Total
Adults	401
Children	38
Don't Know/Refused/Other	0
Missing Information	0
Total	439

Table 3 – Shelter Information

4d. Street Outreach

Number of Persons in Households	Total
Adults	8
Children	3
Don't Know/Refused/Other	0
Missing Information	0
Total	11

Table 4 – Household Information for Street Outreach

4e. Totals for all Persons Served with ESG

Number of Persons in Households	Total
Adults	464
Children	79
Don't Know/Refused/Other	0
Missing Information	0
Total	543

Table 5 – Household Information for Persons Served with ESG

5. Gender—Complete for All Activities

	Total
Male	323
Female	220
Transgender	0
Don't Know/Refused/Other	0
Missing Information	0
Total	543

Table 6 – Gender Information

6. Age—Complete for All Activities

	Total
Under 18	81
18-24	36
25 and over	426
Don't Know/Refused/Other	0
Missing Information	0
Total	543

Table 7 – Age Information

7. Special Populations Served—Complete for All Activities

Number of Persons in Households

Subpopulation	Persons Served – Homelessness Prevention	Persons Served – Rapid Re-Housing	Persons Served – Emergency Shelters	Totals
Veterans	0	2	15	17
Victims of Domestic Violence	45	1	148	194
Elderly	2	3	20	25
HIV/AIDS	0	0	13	13
Chronically Homeless	0	1	196	197
Persons with Disabilities:				
Severely Mentally Ill	9	3	169	181
Chronic Substance Abuse	0	0	177	177
Other Disability	19	5	76	100
Total (unduplicated if possible)	75	15	814	904

Table 8 – Special Populations Served

****Note: Values may be duplicated.**

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

8. Shelter Utilization

Number of New Units – Rehabbed	0
Number of New Units – Conversion	0
Total Number of bed - nights available	26,645
Total Number of bed - nights provided	23,888
Capacity Utilization	90%

Table 9 – Shelter Capacity

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

In FY14, the CoC established written standards for providing assistance in consultation with ESG grantees. The goals identified within these documents are steps to solidify the CoC's compliance with the federal Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act. In FY15, staff and the CoC members and providers continued to follow these written standards.

Based on these performance standards developed in consultation with the CoC, proposed outcomes were developed for specific goals for homelessness and homelessness prevention. In the applications for FY15, service providers proposed to serve 392 persons with Emergency Shelter services; 200 persons with Homelessness Prevention; 70 people with Rapid Re-housing; and 17 people with Street Outreach. In FY15, 439 people were served by Emergency Shelter services; 81 people with Homelessness Prevention; 12 people with Rapid Re-housing; and 11 people with Street Outreach.

CR-75 – Expenditures

11. Expenditures

Note: Expenditures are rounded up to the nearest whole dollar.

11a. ESG Expenditures for Homelessness Prevention

	Dollar Amount of Expenditures in Program Year		
	FY 2012	FY 2013	FY 2014
Expenditures for Rental Assistance	\$16,760	0	\$12,980
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	\$50,310	\$1,970
Expenditures for Housing Relocation & Stabilization Services - Services	0	\$50,477	\$31,170
Expenditures for Homeless Prevention under Emergency Shelter Grants Program	\$12,989	0	0
Subtotal Homelessness Prevention	\$29,749	\$100,787	\$46,120

Table 10 – ESG Expenditures for Homelessness Prevention

11b. ESG Expenditures for Rapid Re-Housing

	Dollar Amount of Expenditures in Program Year		
	FY 2012	FY 2013	FY 2014
Expenditures for Rental Assistance	0	0	0
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	\$8,647	\$1,456
Expenditures for Housing Relocation & Stabilization Services - Services	0	\$16,826	\$11,401
Expenditures for Homeless Assistance under Emergency Shelter Grants Program	0	0	0
Subtotal Rapid Re-Housing	0	\$25,473	\$12,857

Table 11 – ESG Expenditures for Rapid Re-Housing

11c. ESG Expenditures for Emergency Shelter

	Dollar Amount of Expenditures in Program Year		
	FY 2012	FY 2013	FY 2014
Essential Services	\$12,010	0	\$6,436
Operations	\$57,840	\$70,500	\$47,649
Renovation	0	\$3,280	\$16,051
Major Rehab	0	0	0
Conversion	0	0	0
Subtotal	\$69,850	\$73,780	\$70,136

Table 12 – ESG Expenditures for Emergency Shelter

11d. Other Grant Expenditures

	Dollar Amount of Expenditures in Program Year		
	FY 2012	FY 2013	FY 2014
Street Outreach	0	0	\$9,167
HMIS	0	\$16,667	\$6,500
Administration	0	\$6,917	\$6,113

Table 13 - Other Grant Expenditures

11e. Total ESG Grant Funds

Total ESG Funds Expended	FY 2012	FY 2013	FY 2014
	\$99,599	\$223,624	\$150,893

Table 14 - Total ESG Funds Expended

11f. Match Source

	FY 2012	FY 2013	FY 2014
Other Non-ESG HUD Funds	\$79,399	\$28,641	\$171,240
Other Federal Funds	\$10,000	0	\$44,000
State Government	\$402,270	\$201,539	\$1,102,881
Local Government	\$47,582	0	\$33,080
Private Funds	\$241,969	\$621,095	\$79,043
Other	\$970	\$417,155	\$35,670
Fees	0	0	0
Program Income	\$8,300	0	\$3,764
Total Match Amount	\$790,490	\$1,268,430	\$1,469,678

Table 15 - Other Funds Expended on Eligible ESG Activities

11g. Total

Total Amount of Funds Expended on ESG Activities	FY 2012	FY 2013	FY 2014
	\$890,089	\$1,492,054	\$1,620,571

Table 16 - Total Amount of Funds Expended on ESG Activities



Setti D. Warren
Mayor

City of Newton, Massachusetts
Department of Planning and Development
1000 Commonwealth Avenue Newton, Massachusetts 02459

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(617) 796-1120
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(617) 796-1142
TDD/TTY
(617) 796-1089
www.newtonma.gov

James Freas
Acting Director

TO: Mayor Setti D. Warren
FROM: James Freas, Acting Director of Planning and Development
DATE: September 28, 2015
RE: Planning and Development Board Recommendation

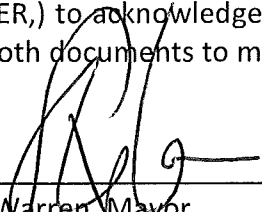
On September 8, 2015 the Planning and Development Board held a public hearing to consider the following housing and community development item.

Public Hearing Item: FY2015 (FFY14) Consolidated Annual Performance and Evaluation Report

Background: Pursuant to federal regulations, the City is required to hold two (2) public hearings per year as a condition of funding from the US Department of Housing and Urban Development (HUD). The grants that are covered by these regulations are Community Development Block Grant, HOME Investment Partnership Program, and Emergency Solutions Grant. In addition, the City must submit (within 90 days of every fiscal year end) a Consolidated Annual Performance and Evaluation Report (CAPER). The CAPER includes extensive quantitative and qualitative descriptions of the City's accomplishments throughout the fiscal year of goals established in the City's Consolidated Plan. It is made available to the public for 30 days, during which time stakeholders may comment and receive responses from the Department.

Accordingly, a public hearing on the CAPER was held at the Planning and Development Board Meeting on September 8, 2015. The hearing was advertised in accordance with the City's Citizen Participation Plan. Housing and Community Development staff presented a slideshow which summarized the contents of the CAPER, and invited questions from board members and the public. The presentation was well received, and comments were shared by the Board members and by the public that will be helpful in guiding the process for creating the Consolidated Plan.

Request: Kindly sign below and the attached Certification, (which must be submitted to HUD with the CAPER,) to acknowledge our compliance with the regulatory requirements for the grants, and return both documents to me in the Planning and Development Department.



Setti D. Warren, Mayor

9/29/15

Date

**Department of Housing and Urban Development
Office of Community Planning**

COVER PAGE/CERTIFICATION

Grantee Performance Report
Community Block Grant Program

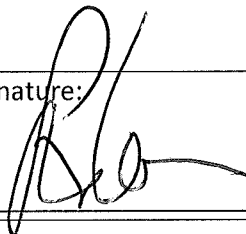
1. PROGRAM YEAR END: 6/30/15	2. GRANT NUMBER: B14MC250019
3. NAME & ADDRESS OF GRANTEE: City of Newton 1000 Commonwealth Avenue Newton, MA 02459-1449	4. NAME & ADDRESS OF CD Manager: Judith Menon, CD Programs Manager Planning and Development Department 1000 Commonwealth Avenue Newton, MA 02459-1449
5. NAME & TELEPHONE NUMBER OF PERSON MOST FAMILIAR WITH INFORMATION IN THIS REPORT: Lydia Scott (617) 796-1132	6. NAME & TELEPHONE NUMBER OF PERSON TO CONTACT ABOUT DISCLOSURES REQUIRED BY THE HUD REFORM ACT OF 1989: Judith Menon (617) 796-1125

7. Have these Community Development Block Grant (CDBG) funds been used:
- a. to meet the community development program objectives in the final statement for this program year? If no, explain, in a narrative attachment, how: (1) the uses did not relate to program objectives; and (2) future activities or program objectives might change as a result of this year's experiences. **YES**
 - b. exclusively to either benefit low-and-moderate (low/mod) income persons, aid in the prevention or elimination of slums or blight, or meet community development needs having a particular urgency? If no, explain in a narrative attachment. **YES**
 - c. such that the grantee has complied with, or will comply with, its certification to expend not less than 70% of its CDBG funds, during the specified period, on activities which benefit low/mod income person? If no, explain in a narrative attachment. **YES**

8. Were citizen comments about this report and/or the CDBG program received?
See Citizen Participation Summary Section and Comments/Responses in Appendix

9. Indicate how the Grantee Performance Report was made available to the public:
See Citizen Participation Summary Section

I hereby certify that: This report contains all required items identified above; Federal assistance made available under the Community Development Block Grant Program (CDBG) has not been utilized to reduce substantially the amount of local financial support for community development activities below the level of such support prior to the start of the most recently completed CDBG program year; all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18U.S.C.1001,1010,1012;U.S.C.3729,3802)

Typed Name and Title of Authorized Official Representative: <p style="text-align: center;">Setti D. Warren, Mayor</p>	Signature: 	<p style="text-align: center;">September 28, 2015</p>
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