

# CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT

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

JULY 1, 2020 – JUNE 30, 2021

## Table of Contents

### **FY21 Consolidated Annual Evaluation and Performance Report**

Executive Summary .....	1
CR-05 Goals and Outcomes .....	12
CR-10 Racial and Ethnic Composition of Families Assisted .....	17
CR-15 Resources and Investments.....	19
CR-20 Affordable Housing .....	25
CR-25 Homeless and Other Special Needs .....	32
CR-30 Public Housing .....	38
CR-35 Other Actions.....	43
CR-40 Monitoring.....	54
CR-45 CDBG .....	56
CR-50 HOME .....	58
CR-60 ESG Subrecipient Information .....	63
CR-70 ESG Assistance Provided and Outcomes.....	66

### **Appendix**

FY21 Goals with Zero Completion.....	69
WestMetro HOME Consortium Public Housing Authority Projects .....	70
Newton and WestMetro HOME Consortium Monitoring Policies and Procedures .....	71
HOME Program Income Expenditures in IDIS in FY21 .....	74
Sage Report.....	76

## Executive Summary

The FY21 (FFY20) Consolidated Annual Performance and Evaluation Report (CAPER) provides an analysis of the first year of the FY21-FY25 (FFY20-FFY24) Consolidated Plan—July 1, 2020 through June 30, 2021—for the City of Newton Community Development Block Grant program (CDBG), Emergency Solutions Grant (ESG) program, and the WestMetro HOME Consortium HOME Investment Partnerships program (HOME). These programs provided the City of Newton and 12 other communities in the WestMetro HOME Consortium with a total of **\$4,018,128.11 in FY21 (FFY20) resources** from The U.S. Department of Housing and Urban Development (HUD).

The CAPER is an assessment of how successful Newton and the Consortium communities were at meeting their goals as identified in the FY21 (FFY20) Annual Action Plan and the FY21-25 Consolidated Plan. In May of 2020 the City submitted the FY21 (FFY20) Action Plan to HUD, which provided details to citizens, public and private agencies, and other interested parties on the program activities that were planned in response to the priority needs identified in the FY21-25 Consolidated Plan. The FY21-25 Consolidated Plan was developed to describe the use of CDBG, HOME, and ESG program funds for housing and community development activities in Newton and housing activities in the 12 other HOME Consortium communities (the towns of Bedford, Belmont, Brookline, Concord, Lexington, Natick, Needham, Sudbury, Watertown, Wayland, and the cities of Framingham and Waltham).

### CDBG, ESG and HOME funds

The following table summarizes the amount of FY21 (FFY20) funds that were received and the amount of funds expended in FY21, including funds from prior years:

Program	Funds Received	Funds Expended
CDBG	\$1,986,743.16*	\$2,420,207.10
HOME Consortium	\$1,836,650.95**	\$1,022,629.01
Emergency Solutions Grant	\$167,734.00	\$120,201.88
<b>Total</b>	<b>\$4,018,128.11</b>	<b>\$3,563,037.99</b>

\*Includes \$55,724.16 in CDBG program income received during FY21 (FFY20)

\*\*Includes \$356,935.95 in HOME program income received during FY21 (FFY20)

The following table is a snapshot of FY21 (FFY20) HOME funds received by Newton from the total WestMetro HOME Consortium funds listed above, and the amount of HOME funds the City expended in FY21, including funds from prior years:

Program	Funds Received	Funds Expended
Newton HOME Funds*	\$174,273.90	\$72,488.84

\*Includes Newton HOME and Consortium Admin funds

In FY21 (FFY20), the City of Newton received \$1,986,743.16 in CDBG funds and expended \$2,420,207.10 in FY21 (FFY20) and prior year funds. The WestMetro HOME Consortium, which includes 13 communities, received \$1,863,650.95 in HOME funds and expended \$1,022,629.01 in FY21 (FFY20) and prior year funds. From the WestMetro HOME Consortium funds, the City received \$174,273.90 in HOME funds and expended \$74,488.84 in FY21 (FFY20) and prior year funds. A total of \$167,734.00 in ESG funds was received by the City in FY21 and \$120,201.88 was expended in FY21 (FFY20) and prior year funds.

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

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

***Goal: Production of affordable housing, and***

***Goal: Rehabilitation of housing***

Through prior years CDBG and HOME funding, the eight units of affordable rental housing at 236 Auburn Street were completed and closed out in FY21 (FFY20). This project, developed by CAN-DO/Metro West, included the acquisition and rehabilitation of an existing historic single-family home into a three-bedroom rental and the new construction of a duplex with one 2-bedroom and one 3-bedroom rental unit. Both homes are affordable to households at or below 60% AMI. The project also included the construction of a 5-bedroom congregate home for developmentally disabled adults at or below 30% AMI. This home is owned and operated by the Barry Price Center.

The Newton Housing Authority's (NHA) Haywood House project closed on its Low Income Housing Tax Credit financing in the Spring of 2021. As a result, construction has commenced with an anticipated completion of Fall 2022. The project, which was awarded FY20 and FY21 Newton CDBG funds, will create 55 new affordable rental units for seniors. The income eligibility will range from

30% AMI to to 99% AMI. Three of the units will be fully accessible and four units will be designated for households that have been homeless or are at risk of homelessness. The project will also include two elevators and community space for supportive services.

A second Low Income Housing Tax Credit project in Newton was underway during the second half of FY21 – 2Life Communities’ Golda Meir House Expansion Project. This project was awarded FY18, FY20 and FY21 HOME funds to support the new construction of 68 affordable rental units for seniors ranging from 30% AMI up to 99% AMI, including 9 units for chronically homeless adults with disabilities. In early August 2021, the project closed on its financing and quickly began construction. In FY22, the City of Newton will continue to push forward the redevelopment of the West Newton Armory site on Washington Street into 100% affordable housing. As an awardee of a \$200,000 Housing Choice Grant from the Department of Housing & Community Development (DHCD), the City hired an affordable housing consultant in FY21 to conduct a predevelopment feasibility study on the site. Concurrently, as part of the City’s Real Property Reuse process, the West Newton Armory Joint Advisory Planning Group (JAPG), consisting of nine community members, analyzed the property and its redevelopment potential over the course of eleven months. Following the completion of the consultant’s study and the JAPG’s report, the City Council unanimously recommended to the Mayor that the City purchase the Armory for \$1 from the State for its redevelopment into 100% affordable housing. At the end of FY21, the City prepared and released a Request for Proposals to identify an appropriate affordable housing developer to develop and manage the site. The City will take ownership of the Armory site in the fall of 2021 and the City intends to select an affordable housing developer in mid-FY22 (FFY21).

Lastly, Newton also maintains its existing affordable housing stock and increases the number of lead safe properties through the CDBG Housing Rehabilitation Program. In FY21, the City rehabilitated five single family homes by addressing code violations and repairs. Through its Rehabilitation Program, Newton is actively working on one homeowner unit and accessibility and parking improvements to a Newton-based group home for intellectually and physically disabled adults.

***Goal: Preservation of Affordable Units***

Following the Newton Housing Authority’s CDBG funding award to acquire and preserve the CAN-DO affordable housing portfolio of 33 units across 12 scattered sites in Newton, the Newton Housing Authority officially closed on the acquisition of the portfolio in FY21. During the closing process, CAN-DO added an additional property, 236 Auburn Street, to the sites to be acquired by the NHA. This increased the acquisition to 36 units across 13 scattered sites. The NHA has spent the second half of FY21 working with the City to prepare scopes of work to rehabilitate this portfolio.

In 2018, CAN-DO disaffiliated from its management partner, Metro West Collaborative Development, placing the future of the portfolio in jeopardy. The City’s Planning & Development

Board voted to approve \$1,200,000 of CDBG funds to support the acquisition and rehabilitation of the portfolio. CDBG funds were used to reduce the portfolio's existing debt through the acquisition process and will be used to fund capital needs improvements across the 12 sites. The City anticipates beginning rehabilitation of these units in FY22 (FFY21). The preservation of this critical portfolio aligns with the priorities of the City's Consolidated Plan, as it serves some of Newton's most vulnerable households - extremely low- and low-income individuals who require a variety of supportive services.

In addition to the preservation of the CAN-DO portfolio, the City also committed FY21 CDBG funds and pre-committed FY22 HOME funds to preserve affordable senior housing at 2Life Communities' Coleman House. The funds will be used to conduct a comprehensive rehabilitation to the building's mechanical systems and infrastructure, as well as accessibility design upgrades to each of the 146 units, restricted for extremely low- and low-income seniors. The improvements will make the project more efficient and environmentally sustainable for the next several decades, as well as improving the quality of life for senior residents. Construction is slated to commence in the first half of FY22 and continue into FY23.

***Goal: Support Affordable Homeownership***

In FY21 (FFY20) staff continued to administer a Downpayment/Closing Cost Assistance program using CDBG funds. This program supports and expands sustainable homeownership among low- and moderate-income households in Newton by targeting first-time homebuyers of new and existing deed-restricted homeownership units. Three income-eligible homebuyers were assisted through the CDBG Downpayment/ Closing Cost Assistance program in FY21.

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

In FY21 (FFY20), five subrecipients were awarded Emergency Solutions Grant (ESG) funds to provide homelessness prevention, rapid rehousing, and shelter services to individuals and families that were homeless or at-risk of homelessness. These subrecipients include Brookline Community Mental Health Center, Community Day Center of Waltham, Middlesex Human Service Agency, REACH Beyond Domestic Violence, and The Second Step. During the FY21 program year, these subrecipients assisted approximately 516 individuals.

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

Affirmatively furthering fair housing is underscored in all the Housing and Community Development Division's programs. Staff works with the Newton Fair Housing Committee to host educational events and disseminate information on fair housing. In FY21, the Planning Department, through the assistance of Barrett Planning Group and JM Goldson LLC Consulting, completed the FY21-FY25 iteration of the Analysis of Impediments to Fair Housing Choice (AI) on behalf of Newton and the WestMetro HOME Consortium. A draft of the plan was released in the first half of FY21 with a public

hearing held shortly thereafter. The final version of the AI was released and submitted to HUD in the last quarter of FY21. Newton is working with the Consortium to implement the goals of this important plan.

The AI is an assessment of state and local government's bylaws, ordinances, statutes, and administrative policies and local conditions that affect the location, availability, and accessibility of housing. It provides a listing of recommendations and strategies for the Consortium to pursue in order to provide greater housing access to all constituencies. Near the end of FY21, the Consortium voted to award HOME Consolidated Pool funds to support one such recommendation: the hiring of a fair housing consultant to conduct fair housing testing throughout the Consortium over the course of a two-year period. The testing program will commence in FY22.

Local preference was also reviewed as part of the WestMetro HOME Consortium's update to its Analysis of Impediments to Fair Housing Choice (AI) report. In fact, the Town of Brookline, a member of the WestMetro HOME Consortium, reduced its local preference requirement from 70% to 25% in July 2020. Since last July, Newton has also been exploring a reduction in the local preference requirement. In January 2021, the City hired a consultant to analyze the benefits and/or negative implications of the policy, particularly as it relates to the City's obligation to affirmatively further equal housing opportunity for all. This item is now before the City Council.

During Fair Housing Month, the City and WestMetro HOME Consortium presented a series of virtual fair housing workshops open to all 13 consortium communities. This workshop, held on April 11 and 29, 2021 focused on land use policies and the critical role that elected officials, boards, and commissions can play in leading the way towards fair housing. In addition, the City updated its Fair Housing Resources webpage ([click here](#)), compiling a robust list of articles, workshops, reports, books, films, and other media on the important subject.

The Newton Fair Housing Committee continues to collaborate with Division staff to disseminate public information on fair housing and to make available written criteria for the City's consideration of fair housing goals as they may apply to proposed developments.

***Goal: Provision of human services***

In FY21, thirteen subrecipients were awarded Community Development Block Grant (CDBG) funds to support their human service projects. One project was cancelled in November of 2020 and reallocated to one of the human service subrecipients through an RFP process offered only to the existing FY21 human service subrecipients. These projects were focused on supporting and enhancing the lives of vulnerable low- and moderate-income individuals across the lifespan. The FY21 Human Services Program focused on three key priority areas: Enrichment and Care for Vulnerable Youth, Aged 0-18 Years; Stability and Self-Sufficiency for Vulnerable Adults, Aged 19-61 Years; and Promoting Economic Security and Vitality for Older Adults, Aged 62+. The FY21 human service projects served individuals and families, youth and elderly, persons with disabilities, and survivors of domestic violence and included financial assistance for summer camp, employment mentorship, child care, emergency payments for rent and utilities, residential services, mental health services, and wellness programming. The City's CDBG Human Services Program assisted a total of 2,031 individuals during the FY21 program year. Of the 2,031 individuals served, 40% were seniors age 62 years and older who received assistance to age in place, 46% were adults aged 19 to 61 years old who received assistance regarding mental health, housing, emergency payments, and 14% were children aged 18 and under who received childcare assistance. Approximately 1% of those served had severe mental illness and 9% were survivors of domestic violence.

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

During the FY21 program year, the City completed the installation of accessible park pathways at Auburndale Park, West Newton Commons, and Weeks Fields. The pathways connected the park entrances to the park amenities. In addition, the City completed the construction of seven ADA compliant curb cuts on Watertown Street at the intersection of Edinboro Street and West Street. Project construction on Phase I of the Marty Sender Trail Installation was ongoing in FY21 and is scheduled to be complete in FY22.

***WestMetro HOME Consortium Goals***

In FY21 (FFY20), the WestMetro HOME Consortium received \$1,836,650.95 in HOME funds and expended \$1,022,629.01 in FY21 (FFY20) and prior year funds. Consortium communities shared three goals in FY21 (FFY20):

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



There were 17 HOME-assisted rental units completed and 3 units rehabilitated in FY21. An additional 60 families were provided with security deposit assistance through Framingham's and Waltham's Tenant-Based Rental Assistance (TBRA) programs. Consortium member communities also laid the groundwork for many pending HOME-assisted affordable housing development projects, each in various phases of development that will be completed in subsequent fiscal years.

### **CARES Act Funds and Programs**

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

<b>Program</b>	<b>Funds Received to Date</b>	<b>Funds Received in FY21</b>	<b>Funds Expended in FY21</b>	<b>Funds Expended to Date</b>
CDBG-CV	\$1,743,641.00	\$607,513.00	\$804,898.42	\$1,450,666.88
ESG-CV	\$1,483,400.00	\$905,007.00	\$952,219.30	\$954,951.83
<b>Total</b>	<b>\$3,227,041.00</b>	<b>\$2,510,127.21</b>	<b>\$1,757,117.72</b>	<b>\$2,405,618.71</b>

CDBG-CV funds were allocated to three programs: COVID-19 Emergency Housing Relief, Small Business Recovery Grant Program (SBR), and Human Services.

#### ***Small Business Recovery Grant Program (SBR)***

The Small Business Recovery Grant Program (SBR) was designed to support the stabilization of existing small brick and mortar businesses within the City that experienced significant business disruption due to COVID-19. The City launched two rounds of the program, both funded with \$300,000 in CDBG-CV. Round 1 launched in May 2020 and announced awards in July 2020, while Round 2 launched in January 2021 and announced awards in March 2021. Both rounds of the program sought to assist small businesses in paying for commercial rent or mortgage, wages, loss of inventory, and other demonstrated costs. Grant awards in each round were divided into two groups: microbusiness grants of \$10,000 (businesses with 5 or fewer employees, including the business owner) or small business grants of \$15,000 (businesses with 5+ - 20 employees). A total of 54 Newton businesses were supported by the SBR Program. In Round 1, a total of 27 applicants were funded from the 107 applications submitted to the City. There were 76 applicants in Round 2, from which 27 businesses received grant awards.

#### ***Emergency Housing Relief Program***

The City of Newton COVID-19 Emergency Housing Relief Program was developed in April 2020, as the economic impacts of the coronavirus were beginning to greatly affect many of the City's most vulnerable residents. Funded through \$3,200,000 of Community Preservation Act (CPA) funds and \$500,000 of Community Development Block Grant CARES Act (CDBG-CV) funds, the program was designed to provide temporary rental and mortgage assistance to Newton households at or below 80% AMI who experienced a reduced income as a direct result of COVID-19. The funding assistance, which was capped at \$2,500 per household per month, covered 70% of an eligible household's

monthly rent or mortgage for up to three months, with possible three-month extensions for qualifying households (extensions funded through CPA funds). CDBG-CV funds were used to support households at the launch of the program in June 2020 through September 2020. These funds assisted a total of 185 Newton households and 551 individuals. At the close of the program in June 2021 a total of 250 households were served. Of these households, six received mortgage assistance with the remainder receiving emergency rental assistance. The average monthly housing payment provided to the households assisted was approximately \$1,100.

Over 80% of total households served by the program had an annual income at or below 50% AMI (at the time of application to the program). Of the total households assisted by the program, approximately 55% had an annual income at or below 30% of the area median income (AMI), with an additional 27% between 31% and 50% AMI. Approximately 10% of the households had an annual income between 51% and 65% AMI, and the remaining 9% of program households had an annual income between 66% and 80% AMI. Approximately 52% of assisted households identified as minorities, with 13% identifying as Black / African American, 9% as Asian, and 24% as Hispanic / Latino. Approximately 38% identified as white.

### ***Human Service Program***

The Human Service CV program also had two rounds of funding, which awarded a total of \$546,716 of CDBG-CV funds. Initially, a Request for Proposals (RFP) was released in July 2021 and 11 applications were submitted to the City by the August, 2021 deadline. In November 2020, the second RFP was released, which yielded seven applications by the December 2020 deadline. Priority was given to proposals that addressed the community's most urgent needs, including food security, affordable childcare, mental health services, and other basic needs. The following table summarizes the ten subrecipients that were selected across both rounds of CDBG-CV funding. Three of the human service CV programs, those administered by NCDF, the Barry Price Center, and the Newton Housing Authority, were completed in FY21. These activities served a total of 1,228 people. The remaining seven projects are expected to close out in FY22.

## Human Service CV Subrecipients

Subrecipient	Program	Description	Funding
2Life Communities'	<i>Emergency COVID-19 Food Relief</i>	Provision of prepared food and grocery delivery services to residents of 2Life Communities' Coleman House.	\$40,000
Barry Price Rehabilitation Center	<i>Ensuring Safe and Enriching Services for Individuals with Intellectual and Developmental Disabilities during the COVID-19 Pandemic</i>	Continuation of case management and other services for the Price Center's clients using Personal Protective Equipment (PPE).	\$17,500
Family ACCESS of Newton	<i>Building Affordable Childcare Capacity for the Returning Workforce</i>	Provision of childcare scholarships for families affected by the COVID-19 pandemic to rebuild the workforce and provide a safe place for children to go while guardians work.	\$155,000
Horace Cousens Industrial Fund	<i>Emergency Assistance for Utilities</i>	Provision of emergency subsistence payments for individuals and families for their utility bills.	\$80,000
Newton Community Development Foundation	<i>Resident Services Touchtown</i>	Provision of virtual programming for residents within their own homes. This project kept residents engaged, informed, and socially distanced throughout the pandemic.	\$24,606
Newton Housing Authority	<i>Resident Services Program</i>	Provision of food delivery, transportation, and remote clinical services to residents to reduce the risk of contracting and/or spreading COVID-19 within their homes.	\$16,460
Newton Department of Senior Service	<i>Food and Essential Item Shopping Program</i>	Provision of grocery shopping and financial assistance services to Newton residents most at-risk of contracting COVID-19.	\$60,150
Pathway to Possible	<i>P2P COVID-19 Support</i>	Provision of critical care and support for P2P's residents with cognitive and developmental disabilities living in their five homes during the COVID-19 pandemic through the use of PPE, enhanced cleaning supplies, and tools for remotely connecting with families and staff.	\$36,000
John M. Barry Boys and Girls Club	<i>Out of School Time Program</i>	This project provided financial aid for children to complete their remote learning schoolwork while schools were closed as a result of the pandemic.	\$33,500
West Suburban YMCA	<i>Childcare Financial Aid Program</i>	Provision of financial aid for remote learning and afterschool care while schools were closed as a result of the pandemic.	\$83,500

### ***ESG-CV programs***

As authorized by the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), the City received two rounds of Emergency Solutions Grant Program Supplemental (ESG-CV) funds from HUD. In total, \$1,458,150 of ESG-CV funds was made available. Two separate RFP's were issued in April 2020 and August 2020. A priority was given to proposals that addressed the community's most urgent needs given the impact of COVID-19. Eligible program components included: Emergency Shelter (essential services, shelter operations, renovation), Homelessness Prevention (rental assistance and housing relocation and stabilization services), and Rapid Re-housing (rental assistance and housing relocation and stabilization services). The following table summarizes the five subrecipients that were selected across both rounds of ESG-CV funding.

### **ESG-CV Subrecipients**

<b>Subrecipient and Program</b>	<b>Funding</b>
Middlesex Human Service Agency for their Waltham Shelter programs affected by the COVID-19 Pandemic project and the City of Waltham's Temporary COVID-19 Emergency Tent Shelter project.	\$278,755
Community Day Center of Waltham's Post- Pandemic Re-Structuring Project and the Winter Night Program and Rehabilitation project.	\$458,155
REACH Beyond Domestic Violence's Safe Housing for Emergency Shelter Guests during the COVID-19 Pandemic project.	\$356,520
Brookline Community Mental Health Center's Homelessness Prevention COVID-19 Response and Rapid Rehousing COVID-19 Response Programs.	\$284,720
The Second Step's Homelessness Prevention for Survivors Impacted by COVID-19 project.	\$80,000

The City of Newton Housing and Community Development Program and the WestMetro HOME Consortium made substantial progress in the first year of the FY21–25 Consolidated Plan. The following pages provide further data and narrative on the accomplishments in each goal area.

## **CR-05 - Goals and Outcomes**

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

The City of Newton receives Community Development Block Grant (CDBG), HOME Investment Partnership (HOME) and Emergency Solutions Grant (ESG) funds from the U.S. Department of Housing and Urban Development (HUD). These funds are utilized to address housing and community development needs in the City of Newton and housing needs in the WestMetro HOME Consortium communities. The FY21 (FFY20) Annual Action Plan identified eight goals for the City of Newton. These goals include: administration, production of new affordable units, support of affordable homeownership, rehabilitation of affordable housing, provision of supportive services to the homeless and at-risk of homeless, increase awareness of fair housing policies and practices, provision of human services, and implementation of architectural accessibility improvements for persons with disabilities.

The City of Newton also received a supplemental allocation of funds in FY20 (FFY19) and FY21 (FFY20) that was authorized by the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) to to prevent, prepare for, and respond to COVID-19. These funds are tied to the FY20 (FFY19) Annual Action Plan and FY20-25 Consolidated Plan through a substantial amendment, but the progress made on CARES Act projects is reported in the narrative of the FY21 (FFY20) CAPER.

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

### **Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)**

Please see data and assessment below.

**CR-05: Goals and Outcomes for City of Newton & WestMetro HOME Consortium for FY21**

Name of Goal	Category of Goal	Funds Expended in FY21	Start Fiscal Year	End Fiscal Year	Goal Outcome Indicator (GOI)	GOI Unit of Measure	Outcome Expected FY21	Actual Outcome FY21	Percent Complete	Expected Outcome FY21-25	Actual Outcome FY21-25	Percent Complete
<b>NEWTON</b>												
Administration	Affordable housing; Non-homeless special needs; Non-housing community development	\$270,747.39	2021	2025	23- Other (Organization)	23- Other (Organization)	1	1	100%	1	1	100%
Production of New Affordable Units	Affordable housing		2021	2025	7-Rental units constructed	7-Household housing unit	0	8	0%	20	8	40%
					9-Homeowner housing added	9-Household housing unit	0	0	0%	1	0	0%
Support Affordable Homeownership	Affordable housing	\$40,000.00	2021	2025	11-Direct financial assistance to homebuyers	11-Households assisted	1	3	300%	8	3	38%
Rehabilitation of Existing Units	Affordable housing	\$1,071,743.71	2021	2025	8-Rental units rehabilitated	8-Household housing unit	25	0	0%	29	0	0%
					10-Homeowner housing rehabilitated	10-Household housing unit	3	5	167%	12	5	42%
Preservation of Affordable Units	Affordable housing	\$659,393.00	2021	2025	23-Other - please specify	23-Other - please specify	33	0	0%	33	0	0%
Fair Housing	Affordable housing		2021	2025	23-Other - please specify	23-Other - please specify	1	1	100%	4	1	25%
Supportive Services for Homeless and At-Risk of Homelessness	Homeless	\$120,201.88	2021	2025	23-Other - please specify	23-Other - please specify	824	516	63%	560	516	92%
Human Services	Non-homeless special needs	\$304,698.00	2021	2025	3-Public service activities other	3-Persons assisted	2,506	3,479	139%	2,500	3,479	139%
Architectural Access	Non-housing community development		2021	2025	1-Public Facility or Infrastructure Activities other than	1-Persons Assisted	1,629	1,385	85%	15,000	1,385	9%

Name of Goal	Category of Goal	Funds Expended in FY21	Start Fiscal Year	End Fiscal Year	Goal Outcome Indicator (GOI)	GOI Unit of Measure	Outcome Expected FY21	Actual Outcome FY21	Percent Complete	Expected Outcome FY21-25	Actual Outcome FY21-25	Percent Complete
<b>HOME CONSORTIUM</b>												
Administration	Affordable housing	\$157,539.72	2021	2025	23- Other (Organization)	23-Other (Organizations)	9	9	100%	9	9	100%
Tenant Based Assistance for Rental Housing	Affordable housing	\$554,598.19	2021	2025	12-Tenant-based rental assistance / rapid rehousing	12-Households Assisted	57	60	105%	150	60	40%
Rehabilitation of Existing Units	Affordable housing	\$146,896.10	2021	2025	8-Rental units rehabilitated	8-Household housing unit	2	3	150%	83	3	4%
					10-Homeowner housing rehabilitated	8-Household housing unit	3	0	0%	3	0	0%
Production of Affordable Units	Affordable housing	\$63,595.00	2021	2025	7-Rental units constructed	12-Households Assisted	4	13	325%	86	13	15%
			2021	2025	9-Homeowner housing added	12-Households Assisted	0	0	0%	0	0	0%
CHDO-Set Aside	Affordable housing	\$-	2021	2025	8-Rental units rehabilitated	8-Household housing unit	0	0	0%	3	0	0%
			2021	2025	7-Rental units constructed	8-Household housing unit	0	0	0%	7	0	0%
CHDO Operations	Affordable housing	\$100,000.00	2021	2025	23 - Other (Organization)	23 - Other (Organization)	1	1	100%	1	1	100%

Table 1 - Accomplishments – Program Year & Strategic Plan to Date



**Assess how the jurisdiction's use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.**

In FY21 (FFY20), Newton and the HOME Consortium utilized CDBG, HOME and ESG funds to address the priorities identified in the FY21-FY25 Consolidated Plan and FY21 Annual Action Plan.

Relative to the production of new affordable housing, the eight units of affordable rental housing at 236 Auburn Street were completed and closed out in FY21 (FFY20). This project, developed by CAN-DO/Metro West, included the acquisition and rehabilitation of an existing historic single-family home into a three-bedroom rental and the new construction of a duplex with one 2-bedroom and one 3-bedroom rental unit. Both homes are affordable to households at or below 60% AMI. The project also included the construction of a 5-bedroom congregate home for developmentally disabled adults at or below 30% AMI. This home is owned and operated by the Barry Price Center.

Newton's First Time Homebuyer Assistance Program served three households in FY21.

Following the Newton Housing Authority's CDBG funding award to acquire and preserve the CAN-DO affordable housing portfolio of 33 units across 12 scattered sites in Newton, the Newton Housing Authority officially closed on the acquisition of the portfolio in FY21. The NHA has spent the second half of FY21 working with the City to prepare scopes of work to rehabilitate this portfolio. The City anticipates beginning rehabilitation of these units in FY22 (FFY21). In addition to the preservation of the CAN-DO portfolio, the City also committed FY21 CDBG funds and pre-committed FY22 HOME funds to preserve affordable senior housing at 2Life Communities' Coleman House. The funds will be used to conduct a comprehensive rehabilitation to the building's mechanical systems and infrastructure, as well as accessibility design upgrades to each of the 146 units.

Homeless prevention, rapid re-housing, street outreach, and shelter services were provided to 516 persons that were currently homeless or at-risk of homelessness through the ESG program.

Newton also maintains its existing affordable housing stock and increases the number of lead safe properties through the CDBG housing rehabilitation program. In FY20, the City rehabilitated a five homeowner units by addressing code violations and repairs.

Affirmatively furthering fair housing is underscored in all of the Housing and Community Development Division's programs. Staff works with the Newton Fair Housing Committee to host educational events and disseminate information on fair housing. In FY21, the Planning Department, through the assistance of Barrett Planning Group and JM Goldson LLC Consulting, completed the FY21 – 25 iteration of the Analysis of Impediments to Fair Housing Choice (AI) on behalf of the

WestMetro Consortium. Near the end of FY21, the Consortium voted to award HOME Consolidated Pool funds to support one of the AI's recommendation: the hiring of a fair housing consultant to conduct fair housing testing throughout the Consortium over the course of a two-year period. The testing will occur in FY22.

Human service projects assisted 3,479 persons in FY21. These projects provided support to families, children, youth, elderly individuals and persons with disabilities.

During the FY21 program year, the City completed the construction of seven ADA Accessible curb cuts on Watertown Street at the intersection of Edinboro Street and West Street. The installation of accessible park pathways at Auburndale Park, West Newton Commons, and Weeks Fields was also completed this year. The pathways connected the park entrances to the park amenities. Finally, project construction on Phase I of the Marty Sender Trail Installation was ongoing in FY21 and is scheduled to be complete in FY22. Not only did these projects remove architectural and material barriers, but they improved accessibility and mobility for persons with disabilities.

In FY21, the City also received and administered CDBG-CV and ESG-CV funds through the CARES Act to prevent, prepare for, and respond to COVID-19. CDBG-CV funds were allocated to three programs: COVID-19 Emergency Housing Relief, Small Business Recovery (SBR) Grant Program, and Human Services. The Emergency Housing Relief program assisted 250 households with mortgage and rental support (although it was not closed out until FY22). A total of 94 businesses were awarded grants through the SBR program; 15 of these were closed-out in FY21. Three of the human service CV programs, those administered by NCDF, the Barry Price Center, and the Newton Housing Authority, were completed in FY21. These activities served a total of 1,228 people. The remaining seven projects are expected to be complete in FY22.

There were 17 HOME-assisted rental units completed in FY21 throughout the WestMetro HOME Consortium, these include:

- Brookline: 370 Harvard Street; 11 HOME-assisted units
- Newton: 236 Auburn Street; 4 HOME-assisted units
- Sudbury: The Coolidge at Sudbury; 2 HOME-assisted units

An additional three units were rehabilitated as part of the HOME-funded Pine Grove project in Lexington. Security deposits and Tenant Based Rental Assistance was provided to a total of 60 families through the Tenant Based Rental Assistance (TBRA) programs in individual communities. These included 37 families in Framingham and 23 families in Waltham.

## CR-10 - Racial and Ethnic composition of families assisted

Describe the families assisted (including the racial and ethnic status of families assisted).

91.520(a)

	CDBG	HOME	ESG
White	3,960	58	357
Black or African American	354	14	109
Asian	371	3	21
American Indian or American Native	8	0	2
Native Hawaiian or Other Pacific Islander	0	0	5
Total	4,873	75	494
Other	492	5	22
Hispanic	344	37	81
Not Hispanic	4,533	43	432

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

### Narrative

In FY21, The City's CDBG program assisted a total of 4,877 persons through the provision of public services, an architectural access project, and housing rehabilitation. The human service program served 3,480 persons; of these persons 2,708 identified themselves as White, 341 identified themselves as Black or African American, 290 identified as Asian, eight identified themselves as American Indian or American Native, and 133 persons identified themselves as multi-racial. A total of 256 of these persons were identified as Hispanic and 3,224 persons identified themselves as Non-Hispanic. Architectural access improvements helped 1,385 people with disabilities city-wide; 1,244 of these persons identified themselves as White, 13 identified themselves as Black, 81 identified as Asian, and 47 identified themselves as multi-racial. A total of 84 of these persons identified themselves as Hispanic and 1,301 persons identified themselves as Non-Hispanic.

Five White, Non-Hispanic owners was assisted through the CDBG housing rehabilitation program. The four rental units that were rehabilitated at 236 Auburn Street are occupied by White Hispanic households.

The HOME program assisted 80 households in FY21. A total of 58 HOME-assisted households identified themselves as White, 14 households identified themselves as Black or African American, three households identified themselves as Asian and five households identified themselves as other. Thirty-seven households identified themselves as Hispanic and 43 households identified themselves as Non-Hispanic.

The ESG program assisted 516 persons. A total of 357 of these individuals identified as White, 109 individuals identified themselves as Black or African American, 21 identified themselves as Asian, two identified as American Indian/Alaskan Native, five identified as Native Hawaiian or other Pacific Islander, and 15 identified themselves as multi-racial. There were two individuals that did not provide racial information and this data was not collected for five individuals. A total of 81

individuals identified themselves as Hispanic, 432 individuals identified themselves as Non-Hispanic, and seven individuals chose not to provide this information.

## CR-15 - Resources and Investments 91.520(a)

### Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	Public - federal	\$4,243,102.69	\$2,420,207.10
CDBG-CV	Public - federal	\$1,029,459.74	\$804,898.42
HOME	Public - federal	\$4,759,214.61	\$1,022,629.01
ESG	Public - federal	\$187,423.39	\$120,201.88
ESG-CV	Public - federal	\$1,480,667.47	\$952,219.30

Table 2 - Resources Made Available

### Narrative

The resources made available for CDBG, HOME and ESG include the FY21 (FFY21) annual allocation, program income, and prior year resources. Adjustments were made in IDIS to the Resources Made Available Table to reflect the receipt of CDBG and HOME program income, the accurate amount of ESG prior year resources, as well as the correct expenditure of CDBG, HOME and ESG funds in FY21 (FFY20). The supplemental funds the City received through the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) were also added to this table.

### Identify the geographic distribution and location of investments

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

Table 3 – Identify the geographic distribution and location of investments

### Narrative

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

## Leveraging

**Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.**

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

In FY21, the public service (human service) projects leveraged approximately \$3,175,905.09 from private foundations and entities, organizational fundraising, state agencies, the City, and program fees. Private foundations and entities included: Perpetual Benevolent Fund, Horace Cousens Industrial Fund Endowment, The Foundation for Racial, Ethnic and Religious Harmony, The Family Foundation, Rebecca Pomroy Foundation, Lawrence J. and Anne Rubenstein Charitable Foundation, Rotary Club of Newton, Eastern Bank, Blue Cross Blue Shield, Tufts Health Plan, Harvard Pilgrim, and United Way. The Massachusetts Department of Children and Families, Department of Developmental Services, Department of Early Education and Care, Department of Public Health/Office of Victim Assistance, and Department of Justice/Office on Violence Against Women also contributed leveraged funds to several public service projects.

During FY21 program year, the ESG program leveraged \$187,494.32. Most of the leveraged funds came from the state government while others came from organizations' own private funds and other resources.

There was no match requirement for the HOME program in FY21. However, the HOME Communities provided a match contribution in the form of cash, foregone taxes, fees or charges. The Consortium's FY21 total match amount is \$136,014,952.49. This amount will be carried over to FY22. Additional detail on the matching funds for the HOME program can be found in Table 4 and Table 5.

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

The provision of special, supportive services for these nine individuals will be offered in partnership with HEARTH, Inc., a nonprofit organization dedicated to the elimination of homelessness among the elderly.

Though not selected for low-income housing tax credits during the 2019 state-funding round, 2Life Communities was awarded 4% LIHTC in the mini-round in the first half of FY20. The project has also been awarded \$255,143 in FY21 Newton HOME funds to fill its funding gap. The project's financial closing is expected to occur in the first quarter of FY22 with construction starting shortly thereafter.

<b>Fiscal Year Summary – HOME Match</b>	
1. Excess match from prior Federal fiscal year	\$86,556,766.49
2. Match contributed during current Federal fiscal year	\$49,458,186.00
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	\$136,014,952.49
4. Match liability for current Federal fiscal year	\$0
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	\$136,014,952.49

**Table 4 – Fiscal Year Summary - HOME Match Report**

<b>Match Contribution for the Federal Fiscal Year</b>								
<b>Project No. or Other ID</b>	<b>Date of Contribution</b>	<b>Cash (non-Federal sources)</b>	<b>Foregone Taxes, Fees, Charges</b>	<b>Appraised Land/Real Property</b>	<b>Required Infrastructure</b>	<b>Site Preparation, Construction Materials, Donated labor</b>	<b>Bond Financing</b>	<b>Total Match</b>
(3450) Ashby Place, Bedford	1/27/2021	\$34,200						\$34,200
(3450) Ashby Place, Bedford	7/17/2020	\$5,665						\$5,665
(3584) Pine Grove, Lexington	8/4/2020	\$17,559						\$17,559
(3573) Coolidge II, Sudbury	6/24/2021	\$85,629						\$85,629
(3610) Brookline: Longwood Housing Development	6/15/2021	\$31,369,004.00	\$475,000.00				\$17,239,598.00	\$49,083,602.00
Various TBRA	7/1/2020	\$231,531.00						\$231,531.00
(3437) 236 Auburn Street	7/1/2020	\$2,123,695.00						
<b>TOTAL</b>		<b>\$33,867,283.00</b>	<b>\$475,000.00</b>	<b>\$0</b>	<b>\$0</b>		<b>\$17,239,598.00</b>	<b>\$49,458,186.00</b>

**Table 5 – Match Contribution for the Federal Fiscal Year**



## HOME Program Income Report

<b>Program Income</b> – Enter the program amounts for the reporting period				
<b>Balance on hand at begin-ning of reporting period</b> \$	<b>Amount received during reporting period</b> \$	<b>Total amount expended during reporting period</b> \$	<b>Amount expended for TBRA</b> \$	<b>Balance on hand at end of reporting period</b> \$
\$209,660.07	\$356,935.95	\$223,310.87	\$205,550.24	\$343,285.15

Table 6 – Program Income

## HOME MBE/WBE report

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period						
	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Contracts						
Dollar Amount	\$15,795,976	0	0	0	0	\$ 15,795,976
Number	2	0	0	0	0	2
Sub-Contracts						
Number	1	0	0	0	0	1
Dollar Amount	\$5,818,576	\$ -	\$ -	\$ 235,379	\$258,030	\$5,325,167
	Total	Women Business Enterprises		Male		
Contracts						
Dollar Amount	0		0		0	
Number	0		0		0	
Sub-Contracts						
Number	1		0		1	
Dollar Amount	\$22,600				\$22,600	

Table 7 – Minority Business and Women Business Enterprises

<b>Minority Owners of Rental Property</b> – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	<b>Total</b>	<b>Minority Property Owners</b>				<b>White Non-Hispanic</b>
		<b>Alaskan Native or American Indian</b>	<b>Asian or Pacific Islander</b>	<b>Black Non-Hispanic</b>	<b>Hispanic</b>	
Number	4	0	0	0	2	2
Dollar Amount	\$1,166,534.64				\$867,549.64	\$298,985.00

**Table 8 – Minority Owners of Rental Property**

<b>Relocation and Real Property Acquisition</b> – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
Parcels Acquired		0		\$0		
Businesses Displaced		0		\$0		
Nonprofit Organizations Displaced		0		\$0		
Households Temporarily Relocated, not Displaced		5		\$46,497.33		
<b>Households Displaced</b>	<b>Total</b>	<b>Minority Property Enterprises</b>				<b>White Non-Hispanic</b>
		<b>Alaskan Native or American Indian</b>	<b>Asian or Pacific Islander</b>	<b>Black Non-Hispanic</b>	<b>Hispanic</b>	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

**Table 9 – Relocation and Real Property Acquisition**

## CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	6	0
Number of Non-Homeless households to be provided affordable housing units	87	79
Number of Special-Needs households to be provided affordable housing units	14	13
<b>Total</b>	<b>107</b>	<b>92</b>

Table 10 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	57	60
Number of households supported through The Production of New Units	2	21
Number of households supported through Rehab of Existing Units	47	8
Number of households supported through Acquisition of Existing Units	1	3
<b>Total</b>	<b>107</b>	<b>92</b>

Table 11 – Number of Households Supported

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

Newton and Consortium staff cite the following reasons for the differences between the goals identified in the FY21 Annual Action Plan for the number and type of households to be provided housing assistance and the actual outcomes that were achieved in FY21.

In Newton, construction of eight rental units at 236 Auburn Street was closed out in FY21. Due to delays experienced by the COVID-19 Pandemic, this project was not closed out in FY20 as originally anticipated. Similarly, the Pandemic affected the ability of the NHA and the City to complete the rehabilitation work on the 33-unit CAN-DO Portfolio. Instead of completing the work in FY21, the City anticipates the work to occur and be completed in FY22.

### *HOME Consortium*

The Bedford TBRA Security Deposit Assistance program completed assistance for nine households to-date. The Town continued to market its TBRA Security Deposit Assistance program in FY21, and will continue to offer the program in FY22. Bedford has also allocated funding for the rehabilitation of the Ashby Place project owned by the Bedford Housing Authority. This project was started in FY20, completed in FY21, and is expected to be closed out in FY22.

In the Winter of 2020, Belmont's planner, who served the City for 30 years, passed away. At that time, there was no other professional planning staff member that could move along any of the progress he was responsible for as a representative of the town to the WestMetro Consortium. The new senior planner started in mid-May 2021. He has been busy evaluating where things were left off and where progress could be made toward the agreed housing goals listed in the FY21-25 Plan. Belmont Housing Authority and Belmont Housing Trust continue discussions on opportunities to redevelop the Housing Authority's properties to increase the number of dwelling units and to target a broader range of household incomes. The program is more complicated than initially contemplated. The Housing Trust completed the Housing Production Plan and began working on the goals included in the Plan. The Trust also secured \$250,000 in Community Preservation Act funds, which will be used for pre-development due diligence work including site surveys, Phase I environmental work, and title searches for the development of new affordable units.

Brookline's 2Life project at 370 Harvard Street was completed and closed out in May of 2021. This new development yielded 11 HOME-assisted units restricted to populations at 60% of AMI or below. The Town also continues to work with the Brookline Housing Authority (BHA) on its Strategic Preservation Initiative as the BHA moves into Phases II and III of its Preservation Initiative, utilizing the HUD Rental Assistance Demonstration program (RAD). Phase II includes the redevelopment of Morse apartments, (FY20 funds), as well as the Sussman and Kickham apartments. The BHA has drawn 95% of HOME funds and it expects to complete the rehabilitation project and close it out in the fall 2021.

Brookline is in the process of selecting a developer who can develop and manage a rental senior housing project (62+) at the Kent/Station Street Town-owned parking lot. Existing municipal parking will be retained on-site, while creating a range of approximately 40 to 65 age-restricted rental units for seniors. The project will underwrite affordable housing available to a range of incomes.

The Town of Concord has allocated HOME funds for two separate projects. One is the construction of a two-bedroom single-family house owned by the Concord Housing Authority. The second project is Christopher Heights, which will provide 83 units of permanently affordable assisted living, 11 of which are expected to be HOME-assisted. Both projects are anticipated to be underway in FY22 with completion before the end of FY25.

The pandemic, lack of housing rehabilitation applications, and the multi-family housing moratorium, enacted by the City Council in September 2020, spurred Framingham to rethink the City's federal funding strategy for program year 2020. In response to housing emergencies caused by the pandemic, all of the Framingham's HOME funds were reallocated to the Tenant-Based Rental Assistance (TBRA) program. A full TBRA program was created to provide a monthly rental stipend for families working with Family Promise Metrowest in Natick. As result the City assisted fewer households than targeted, however, this program enabled 17 formerly homeless households to be housed during a time when housing units were scarce. For FFY21 and possibly FFY22, staff expects the majority of the TBRA funds to be used for the full TBRA program rather than the security deposit only program.

The Town of Lexington committed FY19 and FY20 HOME funds for the Lexington Housing Authority project at Pine Grove Village. This project includes the rehabilitation of five units, three of which are HOME-assisted. Pine Gove Village was completed in FY21.

In FY21, the Natick Service Council was able to functionally start a new Tenant Based Rental Assistance (TBRA) program after a year of delay caused by staff shortages. Unfortunately, the Council struggled to use HOME funds to provide Tenant Based Rental Assistance (TBRA) to its clients facing rent arrears and potential homelessness in the midst of the COVID-19 pandemic. Grant funds for security and other rental deposits could not be obtained in time for tenants to use the assistance to occupy new housing. The Service Council and the Town's Community & Economic Development Department (CED) collaborated on revising the program's guidelines to allow grant funds to be used for a wider array of rental payments, and opened the program to formerly homeless clients of Family Promise.

The Town of Needham has a long-standing working relationship with the Needham Housing Authority (NHA) in providing support to modernize and redevelop the NHA's property inventory. The NHA issued a Request for Proposals for development consultants to help it determine the best approaches for project financing. The Town committed \$150,000 towards this work, and the Town's community housing specialist provided technical support in the review of the RFP and served on the Selection Committee. The Cambridge Housing Authority has been hired by the NHA as the consultant.

The Coolidge at Sudbury which provides 56 units, of which two, one-bedroom units will be HOME assisted units was completed and closed out in FY21.

The communities of Bedford, Framingham, Waltham and Wayland utilize HOME funds to run a Tenant Based Rental Assistance program providing households with security deposit assistance. The programs have proven successful in assisting low and moderate-income households in securing stable housing. During FY21, 23 cases were completed in Waltham and 37 cases were completed in Framingham.

In FY21, Waltham offered TBRA programs that provide ongoing rental assistance. These programs assist in transitioning homeless or households at-risk of homelessness into stable housing. Waltham initiated full TBRA rental assistance for 3 new households during FY20. One household of the 23 full rental assistance households renewed for a fifth year, three renewed for a fourth year, six for a third year, and ten for a second year. All full rental assistance households in Waltham are required to apply for public housing. In the event that the wait list for public housing is longer than three years, TBRA clients may have their HOME TBRA subsidies extended subject to the availability of HOME funds. The goal of Waltham's TBRA program is to provide a bridge to transition the HOME-assisted households into public housing.

Watertown has very limited HOME funds, even including program income, to create HOME-assisted or any affordable units. In recognition of this, Watertown has sought ways other than the use of HOME funds to increase the supply and types of affordable units. The Town's first Community Preservation Act funding round is expected to open in the Fall of 2021, which will allow housing awards in 2022. The Watertown Housing Partnership committed \$275,000 in CDBG program income for an emergency rental assistance program for income-eligible renters whose ability to pay has been affected by COVID-19.

Wayland began a TBRA Security Deposit Assistance program in FY20 and has completed assistance for four households to date. Two households were assisted in FY21. The Town plans to continue offering the program in FY22.

### **Discuss how these outcomes will impact future annual action plans.**

The HOME Consortium has identified the following additional actions and strategies to effectively implement the goals of the FY21-25 Consolidated Plan.

The Towns of Bedford, Concord, Lexington, Sudbury, and Wayland will collaborate and pool resources as part of the Regional Housing Services Office (RHSO). The RHSO increases the

number and visibility of these smaller communities' affordable housing opportunities by assisting them with program administration, proactive monitoring, project development, and resident assistance.

Bedford and Wayland will continue its Tenant Based Rental Assistance Programs and Concord will continue to work towards committing HOME funds for Christopher Heights and the Concord Housing Authority project, both of which are anticipated to be complete during the FY21-25 Consolidated Plan. All communities plan to explore additional uses for HOME funds going forward.

The Town of Brookline will continue to process applications for comprehensive permits (40B) despite reaching the safe harbor status, and implement its Inclusionary Zoning Bylaw, which will result in a significant number of new affordable housing units serving households below 50%, 80%, and 100% of AMI, over the next several years. Brookline will continue to work with the Brookline Housing Authority to support the reservation and possible expansion of its federal public housing portfolio through HUD's Rental Assistance Demonstration (RAD) program. This new initiative will take place over the next five years and may require financial and permitting support from the Town.

The immense loss of a Belmont planning staff member, with 30 years of service, slowed down progress towards the listed housing goal. The Town has been active on determining any changes to the housing goal and any new goals that may be helpful. Belmont will continue to work with its housing authorities and its housing trust on development projects.

The Towns of Belmont and Needham will continue to work with their respective housing authorities on development projects. In Belmont this will likely be a redevelopment project on housing authority property. It is anticipated that HOME funding will be helpful in financing some of the modernization or redevelopment work for Needham Housing Authority projects.

The temporary housing moratorium has eliminated any plans to develop multi-family housing in Framingham for the coming year. Prior to the pandemic the Framingham Housing Authority Carlson Crossing's project was approved to be constructed. Previous years program income will be allocated to this project in FY22. Also, staff hopes that some housing units will be developed in Framingham using American Rescue Plan Act (ARPA) funds.

Once the moratorium expires, Framingham will continue collaborating with nonprofit developers to create more affordable units in the community. The City's most successful housing projects have been with nonprofit developers, such as Framingham Housing Authority,

Preservation of Affordable Housing, and South Middlesex Opportunity Council. The City aims to build upon this pattern of success.

Natick will continue to focus HOME funds on Tenant Based Rental Assistance (TBRA) now that the Natick Service Council has revised its TBRA program and executed revised sub-recipient agreements with the WestMetro HOME Consortium and has a new executive leadership team in place so that it can serve more of its existing clientele and formerly homeless clients of Family Promise seeking permanent housing.

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

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

With the potential of combining CPA funding with HOME and other funding sources, Watertown may be able to create new affordable units in future fiscal years without relying exclusively on Inclusionary Zoning units. In addition to this new funding source, the Town is likely to create a municipal affordable housing trust within the next year. Such a trust has been endorsed by a joint committee of the Town Council and will now proceed to the full Council for a vote.



**Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity.**

<b>Number of Persons Served</b>	<b>CDBG Actual</b>	<b>HOME Actual</b>
Extremely Low-income	1	46
Low-income	2	14
Moderate-income	9	20
<b>Total</b>	<b>12</b>	<b>80</b>

**Table 12 – Number of Persons Served**

### **Narrative**

Newton's CDBG-funded housing rehabilitation program assisted two low-income (earning 30-50% of the AMI) and three moderate income (earning 50-80% of the AMI) homeowner households in FY21. The rental rehabilitation project, 236 Auburn Street, assisted one extremely low-income household and three moderate-income households, earning 50-80% of the the AMI.

There were 80 households assisted through the HOME program in FY21. Newton's Auburn Street project created four HOME-assisted rental units; one of these units was rented to a low-income households and three units were rented to moderate income households. The two HOME-assisted units that were constructed as part of The Coolidge at Sudbury Phase II Hollis Street project, were rented to moderate-income elderly households. Framingham's Security Deposit Assistance program helped 30 extremely low-income, five low-income, and two moderate-income households (earning 50-80% of the AMI). Waltham assisted nine extremely-low income, eight low-income, and six moderate-income households with rental assistance. There are two extremely-low income and one moderate-income residents living in the three HOME-assisted units that were rehabilitated as part of Lexington's Pine Grove project. The 11 HOME-assisted units in Brookline's 370 Harvard Street project are occupied by two extremely-low income and one low-income household.

## **CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)**

**Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:**

**Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

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

Following the merger of the Brookline-Newton-Waltham-Watertown (BNWW) Continuum of Care (CoC) with the Balance of State (BoS) CoC in FY17 (FFY16), efforts were quickly undertaken to ensure integration into the BoS CoC Coordinated Entry System. Comprised of over 80 communities, the BoS CoC provided the BNWW CoC with access to the many agencies already established within the CoC. The merger effectively maximized and expanded existing regional resources to better connect at-risk individuals and families with information, referrals, and assistance. Subsequently, BNWW CoC agencies integrated within the BoS CoC Coordinated Entry System by April 1, 2017. On March 16, 2017, training was facilitated at Newton City Hall with CoC agencies and local providers to discuss the BoS CoC Coordinated Entry process, Vulnerability Assessment tool, and referral requirements. Throughout FY20, BNWW CoC agencies attended the monthly BoS CoC planning group meetings to stay abreast on new changes made to the Coordinated Entry process.

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

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

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

In FY21, the City utilized ESG funds to assist in operating four shelters within the BNWW region, including an overnight shelter for individual men, women, and survivors of domestic violence. ESG funds also supported the operations of a day shelter, which provided warmth, food, case management, counseling, access to basic needs, and referrals to appropriate service providers. Over the course of the FY21 program year, July 1, 2020 - June 30, 2021, \$45,878.75 of FY21 and

\$766,744.14 in ESG-CV funds were expended for emergency shelter services.

The need for emergency assistance remains present in the CoC. The BoS CoC, in coordination with several agencies from the former BNWW CoC, completed the 2020 Point-in-Time (PIT) Count on January 29, 2020. In addition, the BoS CoC created an electronic self-survey based on HUD's Interview tool. The self-survey was sent to libraries and drop-in centers throughout BoS CoC, with the hope to capture additional information on homeless individuals who may be utilizing those facilities. In summary, a total of 1,918 homeless persons were counted throughout the entire BoS CoC service area. Of those, 1,499 persons were in emergency shelters; 238 homeless persons were in transitional housing programs; and 181 persons were unsheltered.

Of the total PIT Count, 301 homeless persons were counted in the Brookline-Newton-Waltham-Watertown region. Of those, 210 persons were in emergency shelters; 46 homeless persons were in transitional housing programs; and 45 persons were unsheltered. The PIT Count for 2021 has not yet been completed.

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

**Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs**

Creating and preserving permanent affordable housing that integrates supportive services often helps individuals and families with the greatest need. During FY18 (FFY17), the City undertook actions defined in its Housing Strategy to achieve Massachusetts' Chapter 40B "Safe Harbor" status, in which 10% of its housing stock are affordable for low- and moderate-income households, by 2021. Newton continues to advance its Housing Strategy completed in 2016, which addresses current and projected housing needs within the City. The report identified

critical policy, regulatory and financial approaches to help the City become more efficient and effective in addressing these needs. An update to the City's Inclusionary Zoning Ordinance was one of ten Priority Actions listed in the Strategy, in addition to the reuse and disposition of municipally owned land at 160R Stanton Avenue (the Water Tower site) for the development of affordable housing for seniors and residents seeking supportive services. After releasing a Request for Proposals (RFP) in FY18, the City selected 2Life Communities, formerly known as Jewish Community Housing for the Elderly, to expand their existing Golda Meir House which directly abuts the Water Tower site and includes 199 units of affordable senior housing with extensive programming and services. 2Life Communities proposed the addition of 68 affordable senior housing units, including nine units for chronically homeless individuals. The project received its comprehensive permit in December 2018 and was awarded 4% LIHTC in the mini round in the first half of FY20. The project has also been awarded \$255,143 in FY21 Newton HOME funds to fill its funding gap. The project's financial closing is expected to occur in the first quarter of FY22 with construction starting shortly thereafter.

Additionally, the City's ESG program appropriately targets homelessness prevention and rapid rehousing programs to provide vulnerable individuals and families with critical resources to avoid crisis, stabilize their housing, and move them towards permanent housing. ESG subrecipients and CoC providers work closely with the Massachusetts Department of Children and Families (DCF) and the Department of Mental Health (DMH) on discharge policies for youth and clients of DMH. One of Newton's ESG subrecipients, Brookline Community Mental Health Center, develops individualized service and transition plans for Transition to Independent Living Program participants, age 16-22. Youth are routinely discharged to reunify with their families or to move into another housing option if reunification is not possible or if the youth's age permits.

The BoS CoC is also a key partner in fostering relationships with facilities potentially discharging participants to homelessness and establishing a far-wider continuum and network of services. These services range from safety and basic needs at the emergency shelter level to case management and daily living skills at the transitional and supportive housing stage, and finally to sustainable community integration through permanent housing.

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were**

recently homeless from becoming homeless again

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

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

As part of this process, the City selected a 0.39-acre parcel (16,900 square feet) of municipally owned land, located at 160R Stanton Avenue, to reuse and create permanent supportive housing for chronically homeless adults with disabilities. In FY18, the City issued a Request for Proposals for the development of this underutilized site into permanent supportive housing for chronically homeless adults with disabilities. 2Life Communities, formerly Jewish Community Housing for the Elderly (JCHE) and owner of the Golda Meir House at 160 Stanton Avenue, was selected as the developer of the site and entered into a Ground Lease with the City for the property. This new community will create 68 new units for low-income seniors through the construction of two additions to the existing Golda Meir House (which currently includes 199 units of affordable senior housing). 2Life Communities proposed the addition of 68 affordable senior housing units, including nine units for chronically homeless individuals. The project received its comprehensive permit in December 2018 and was awarded 4% LIHTC in the mini round in the first half of FY20. The project has also been awarded \$255,143 in FY21 Newton HOME funds to fill its funding gap. The project's financial closing is expected to occur in the first quarter of FY22 with construction starting shortly thereafter.

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

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

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

In FY21, the City utilized ESG funds for homeless prevention and rapid rehousing services within the BNWW region to reduce the number of individuals and families who are evicted from housing and ensure that those displaced find new housing quickly. These funds not only

provided the financial resources to keep at-risk households housed but were also central in providing supportive services to help stabilize the household and ensure successful tenancies in the long term. During FY21 program year, July 1, 2020 - June 30, 2021, \$11,218.56 of FY21 and \$138,047.08 of ESG-CV funds were expended for homelessness prevention assistance. An additional \$66,852.54 of FY21 and \$16,212.27 of ESG-CV funds were expended for rapid re-housing assistance.

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

Throughout FY21, the City partnered with nonprofit and for-profit developers to identify new opportunities for housing development and collaboration.

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

Through prior years CDBG and HOME funding, the eight units of affordable rental housing at 236 Auburn Street were completed and closed out in FY21. This project, developed by CAN-DO/Metro West, included the acquisition and rehabilitation of an existing historic single-family home into a three-bedroom rental and the new construction of a duplex with one 2-bedroom and one 3-bedroom rental unit. Both homes are affordable to households at or below 60% AMI. The project also included the construction of a 5-bedroom congregate home for developmentally disabled adults at or below 30% AMI. This is owned and operated by the Barry Price Center.

Looking to FY22 and beyond, the City will continue to build upon these efforts and widen its network of housing providers to leverage existing resources.

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

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

In FY21, the Massachusetts Department of Housing and Community Development (DHCD), the lead agency for the BoS CoC, conducted a region-wide needs assessment to obtain feedback from providers, direct care workers, and constituents regarding housing needs within the Brookline, Newton, Waltham, Watertown area. The assessment will culminate in a report that will inform future strategies and the allocation of resources for at-risk individuals and families. The BoS CoC hosted the first needs assessment meeting among BNWW CoC providers at the Community Day Center of Waltham on July 31, 2019. The City supported BoS CoC's outreach efforts and hosted the second needs assessment meeting at Newton City Hall on September 11, 2019. The final needs assessment report is expected to be complete by 2021.

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

### **Actions taken to address the needs of public housing**

In accordance with its goal to develop additional affordable housing in the City of Newton, the Newton Housing Authority (NHA) is in the process of developing 55 one-bedroom units for elders with funding from the Low Income Housing Tax Credit (LIHTC) program, Newton Community Preservation Act funds and CDBG funds, and HOME funds from DHCD.

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

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

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

- Reuse of underutilized property.

The Pine Grove Village project was completed in FY21. This project included the renovation of five Lexington Housing Authority units, three of which are HOME-assisted. Pine Grove Village was part of larger project that preserved the affordability of a property with an expiring use restrictions. The Ashby Place project includes renovation of a community building and roof replacement for two residential buildings at this Bedford Housing Authority owned property, which houses 80 residents. This project was completed in FY21, but will be closed out in FY22.

The Belmont Housing Authority and Belmont Housing Trust continue discussions on opportunities to redevelop the HA's properties to increase the number of dwelling units and to offer the units to a broader range of household incomes. This project is more complicated than originally anticipated. The Town of Needham also continues to work with the Needham Housing Authority in its efforts to explore the feasibility of new development or redevelopment opportunities on NHA properties. It is hoped that such a project would not only expand the supply of publicly-assisted units, but also offer housing units with substantial upgrades related



to appearance, construction standards, energy-efficiencies, and amenities.

- Leverage HOME funds with other resources.

Many communities support Housing Authority projects by leveraging HOME funds with state, Community Preservation Act, and other town funds.

The Town of Needham approved \$150,000 in CPA funding to hire a consultant to help the Needham Housing Authority (NHA) identify and obtain the necessary financing for major modernization and redevelopment projects to upgrade its property inventory. The Town also supported this effort by providing technical input into a Request for Proposals (RFP) through its Community Housing Specialist. The RFP was issued on April 28, 2021 to select the development consultant, and the Town's Community Housing Specialist served on the Selection Committee. The NHA Board of Commissioners approved the recommendation to hire the Cambridge Housing Authority as the consultant on June 24, 2021 and work has already begun.

The Town has a long-standing commitment to the upgrades of NHA developments and has reserved approximately \$2 million in CPA funding to support this work. HOME Program funding is expected to be helpful in project financing.

The Waltham Housing Authority CPA award for roof replacement at Grove Street elderly housing was increased to \$1,681,850 to compensate for the the bids coming in much higher than anticipated.

The Watertown Housing Authority (WHA) expected to complete a modernization project focused on parking lot and pathway improvements at 55 Waverley Avenue by mid-2020 but because of the need for additional stormwater retention and COVID-19, it has been rolled into a larger project. The WHA expects to spend \$2.7 million of state capital bond financing over the next three years in state public housing modernization. Projects include: asphalt walkway, parking lot, and site improvements for 55 Waverley's 164 units; installation of emergency generator at 100 Warren Street; screen door replacements, across 25 buildings, at the WHA's Lexington Gardens development; a fully upgraded Learning Center at the Lexington Gardens development; and a three million dollar phased project to upgrade the site accessibility, community room, laundry room, and kitchens of the 40 units at McSherry Gardens.

The WHA spent over 1.3 million dollars in insurance monies to reconstruct eight units at Robert Ford Road that were damaged by fire in January 2020. These units went back online in July 2021.

- Utilize CDBG Funds to support public housing.

Entitlement communities in the Consortium also utilize CDBG funds to support rehabilitation and capital improvement projects. Newton CDBG Housing Rehabilitation program funds are available to the Newton Housing Authority for accessibility improvements and emergency maintenance. Waltham Housing Authority Chesterbrook Roadway project is underway utilizing \$385,000 in CDBG funds for the reconstruction of the roadways and sidewalks at Waltham Housing Authority's Chesterbrook Family housing as part of a larger DHCD project. This project will provide major ADA and infrastructure improvements to the site with completion slated for late summer 2021. In addition the Waltham Housing Authority receives an annual CDBG allocation of \$15,000 for the computer learning centers at three family public housing locations.

Framingham works to increase the supply of affordable housing and preserve existing public housing in the community by leveraging HOME funds against other resources, utilizing CDBG funds and reusing underutilized property. The City also has a 10% inclusionary zoning provision in our Zoning Ordinance that requires any project over 10 units to provide at least 10% of their units as affordable. There is no buyout, therefore developers must comply. The Tribune Apartments and Hollis projects – both completed in recent years -- are evidence of the City's successful and strong partnership with the Framingham Housing Authority (FHA). These projects range from ADA compliance upgrades to property acquisition and comprehensive rehabilitation of neighborhood properties. The City and the Housing Authority have made significant progress on their mutual goal of renovating new and older properties within the FHA portfolio to eliminate neighborhood blight.

In June, the City of Framingham approved a substantial amendment to use \$130,000 in prior year HOME program income for the Carlson Crossing project, a rehabilitation of the FHA's 125-unit federal development, which will start construction in the Fall of 2021.

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

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

The Bedford Housing Authority will continue its social service program to connect families to the resources necessary to stabilize their living situation and improve their quality of life. The program will provide financial literacy education, skill training, career coaching, and other

support services to a maximum of 15 low-income households currently residing in Bedford Housing Authority units.

The Belmont Housing Authority (BHA) holds monthly meetings rotating between their four developments to facilitate residents' participation. Residents are encouraged to provide input in various projects undertaken by the BHA.

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

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

In January 2020, Needham's Department of Health and Human Services completed an assessment of NHA residents' challenges, resources, and opportunities to better understand the needs of tenants and increase their access to a range of Town services. This effort will continue to inform community planning to ultimately improve NHA residents' quality of life.

It should also be mentioned that a resident was involved in the Selection Committee that reviewed responses to an RFP seeking a development consultant to help the NHA modernize and redevelop its properties. The engagement of residents is an important component of the consultant's work.

In Waltham, residents may participate in the management and operations of the Waltham Housing Authority (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 represents residents' interests in the decision-making process. Additionally, the WHA maintains a Resident Advisory Board, comprised of federal Public Housing residents and Section

8 participants. This Board meets twice a year to discuss proposed capital improvement projects and the application of federal funds. At these meetings, the residents have an opportunity to make proposals regarding the use of funds for the needs of the residents. Finally, the Board of Governors provides an opportunity for residents to address the board at monthly meetings.

The Watertown Housing Authority participated in the Massachusetts Learning, Employment and Asset (MassLEAP) program until it ended in August 2019. The WHA responded to a NOFA for a similar program in 2020 but unfortunately it was not selected for funding. The Watertown Housing Authority provided an optional vaccine clinic for its nearly 326 elderly residents in early March 2020, conducted in conjunction with the State and local Board of Health. Furthermore, the WHA restarted resident coffee hours and strongly encourage both family and elderly residents to form a local tenant organization to empower and provide effective results for all residents.

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

#### **Actions taken to provide assistance to troubled PHAs**

N/A

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

**Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)**

In FY20, Newton continued its Zoning Redesign. Zoning Redesign is the City of Newton's project to rewrite and redesign its Zoning Ordinance to create an easily understood, context-based ordinance that reflects current best practices, is forward thinking, but still preserves what is best about Newton.

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

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

At the end of the first half of FY21, ZAP acknowledged the significant work still remained and stated that there would not be a vote on the proposed ordinance in calendar year 2021. Near the end of FY21, the City's Zoning Redesign process began focuses the City's villages centers. The City is currently in the process of a citizen engagement effort to solicit feedback from citizens as to what their aspirations are for the future of the City's village centers.

In FY21, the Planning Department, through the assistance of Barrett Planning Group and JM Goldson LLC Consulting, completed the FY21 – 25 iteration of the Analysis of Impediments to Fair Housing Choice (AI) on behalf of the WestMetro Consortium. A draft of the plan was released in the first half of FY21 with a public hearing held shortly thereafter. The final version was released in the last quarter of FY21.

The AI is an assessment of state and local government's bylaws, ordinances, statutes, and administrative policies and local conditions that affect the location, availability, and accessibility of housing. It provides a listing of recommendations and strategies for the Consortium to pursue in order to provide greater housing access to all constituencies. Near the end of FY21, the Consortium voted to award Consolidated Pool funds to fund one such recommendation:

the hiring of a fair housing consultant to conduct fair housing testing throughout the Consortium over the course of a two-year period. The testing will occur in FY22.

At its last meeting of FY21, the Consortium agreed to make the implementation of AI a standing agenda item on all Consortium meetings moving forward. The Consortium divided the communities into four different committees to implement the AI recommendations: policy, general educations, testing, and preparation/publicity of Fair Housing Month. The policy committee agreed to undertake a residential parking study of the communities in the Consortium. The Consortium desires to confirm whether the parking requirements imposed by communities on new residential projects are justified or if they are a hinderance to the size and cost of a project. The committee will conduct its study in the first half of FY22 to determine how many parking spots are actually utilized at residential projects throughout the Consortium.

Newton continues to advance its Housing Strategy completed in 2016, which addresses current and projected housing needs within the City. The report identified critical policy, regulatory and financial approaches to help the City become more efficient and effective in addressing these needs. An update to the City's Inclusionary Zoning Ordinance was one of ten Priority Actions listed in the Strategy, in addition to the reuse and disposition of municipally-owned land at 160R Stanton Avenue (the Water Tower site) for the development of affordable housing for seniors and residents with disabilities seeking supportive services. After releasing a Request for Proposals (RFP) for the sale of this property in FY18, the City selected 2Life Communities, formerly Jewish Community Housing for Elderly, to expand their existing Golda Meir House which directly abuts the Water Tower site and already includes 199 units of affordable senior housing with extensive programming and services. 2Life Communities proposed the addition of 68 affordable senior housing units, including nine units for chronically homeless individuals. The project received its comprehensive permit in December 2018 and was awarded 4% LIHTC in the mini-round in the first half of FY20. The project has also been awarded \$255,143 in FY21 Newton HOME funds to fill its funding gap. The project's financial closing is expected to occur in the first quarter of FY22 with construction starting shortly thereafter.

### *Consortium*

In FY21, Bedford, Concord, Lexington and Sudbury continued work on developing zoning and other local development incentives to promote the inclusion of affordable units in new developments. Under existing local zoning incentives, several multi-unit developments, including new affordable units, made progress this year.

Belmont adopted a Housing Production Plan in April 2018 that identifies goals and strategies for

producing affordable housing units in town. Belmont worked to increase production of affordable housing through approval of both special permit and comprehensive permit projects. Special Town Meeting in the fall of 2020 passed a zoning amendment to rezone McLean District Zone 3 to provide 6 affordable homeownership units and 28 affordable rental units. An applicant is currently seeking approval from the Planning Board utilizing the newly approved Zoning Bylaw amendment. The same number of affordable units are proposed in the current application as the zoning bylaw prescribes.

Brookline continued to require, through its Zoning Bylaw, the provision of affordable housing from all new developments of six or more units.

The Town supported the Brookline Housing Authority, who owns and manages the largest affordable housing portfolio in the Town. There is a long recognized priority for the Town to assist the BHA with its preservation efforts, including addressing capital needs, as well as for partnering on development opportunities when the BHA can increase the Town's supply of affordable housing units. In FY21, the Town of Brookline continued working with the Brookline Housing Authority on Phase 1 and Phase 2 of a multi-year Strategic Preservation Initiative. This project took advantage of HUD's Rental Assistance Demonstration Program (RAD) as well as federal and state tax credits and state and local subsidies to rehabilitate and preserve nearly 500 units of affordable public housing in six different properties.

Less than 10% of Brookline's residential building stock is designated as affordable, as defined by the requirements of MA Department of Housing and Community Development's Subsidized Housing Inventory (SHI). For this reason, Brookline has experienced a continued influx of development proposals that utilize the comprehensive permitting process established by Massachusetts General Law, Chapter 40B. Town departments provided organized input and administration when these proposals occurred, with the intent to produce affordable housing that effectively meets the needs of all Town residents and remains permanently affordable.

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

During FY20 the City Council enacted a multi-family housing moratorium that is set to expire in September, 2021. The city has been working on the economic development plan and traffic

study to address the concerns cited in the moratorium.

Natick's primary tools for the local production of affordable housing include the State's 40B/Comprehensive Permit Process and 40R zoning district, and the local HOOP zoning district. The Town promotes housing development in these districts and in October 2018 incorporated Inclusionary Zoning for Affordable Housing provisions to its zoning by-law. Currently a developer is seeking an Inclusionary Housing Special Permit to enlarge an approved subdivision by paying nearly \$1,000,000 to the Natick Affordable Housing Trust for affordable housing preservation and production. Natick is exploring further zoning amendments to encourage the creation of smaller and barrier-free homes.

The largest barrier to affordable housing Waltham residents experience is the constant increase in housing costs. While there are public policies to create affordable housing and public policies to incentivize affordable housing, a majority of Waltham residents are unable to afford the housing they are already living in. Funding constraints hinder the City's ability to keep up with subsidizing housing in order to keep families in their homes and avoid homelessness. Waltham works to increase production of affordable housing through approval of both special permit and comprehensive permit projects. Public comments received through general meetings and forums also indicate a lack of ability to grow. Many lots have been built-out throughout Waltham and congestion has increased. The recently formed ad-hoc Housing Committee recommends the following:

- Allocate 5% of annual building permit fees to the Municipal Housing Trust Fund. Based on the last ten years, this would dedicate roughly \$340,000 annually to the MHTF.
- Adopt the Community Impact Fee (3%) on short term rentals (not hotels). By state law, 35% of this fee must be spent on affordable housing and/or public infrastructure. Council should take a step further, as permissible by law, to make 100% of the Community Impact Fees apply to affordable housing.
- Adopt Accessory zoning ordinances to remove apartment restrictions (i.e.: in-law apartment limitations) to legalize currently illegal apartments within residences and bring them up to building and safety code requirements. This would give amnesty to current residential apartment owners who bring their properties up to code and expand the number of affordable apartments or rooms available to the general public.
- Require developers of large properties to analyze the impact of their projects on fair housing (whether a new housing development alleviates or adds to efforts to build racially and economically integrated neighborhoods) and require large scale developers to create plans which advance housing accessibility.

Needham approved a new bylaw at its 2021 Annual Town Meeting to encourage mixed-use



development at an important location on Highland Avenue and next to Route 128. This zoning allows multi-family development with a requirement that 12.5% of the units be affordable.

While the Town has inclusionary zoning mandates as part of a number of its zoning bylaws, it will be exploring the extension of inclusionary zoning provisions on a town-wide basis in the coming months. It will also be preparing a Housing Plan that will revisit priority local needs and identify strategies to best address these needs now that the Town has surpassed the 10% affordability threshold under Chapter 40B.

Watertown adopted a Housing Plan for 2021-2025 in March 2021. The Plan includes multiple strategies to be evaluated and/or implemented during this period. With respect to barriers to affordable housing, the Plan includes the following: creation of a municipal affordable housing trust to facilitate the combination of funding sources; consideration of a “nexus” fee paid by commercial developers to fund creation of new affordable housing required by job creation; potential amendment to the zoning ordinance to allow accessory dwelling units in at least some circumstances; and a short-term rental assistance program. Progress has been made on creating an Affordable Housing Trust since the Plan’s adoption in March 2021. The Town continues to have a tax abatement, deferral, and exemptions program.

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

The City met or surpassed expected outcomes in its production of affordable housing, support of affordable homeownership, rehabilitation of homeowner housing, and provision of human services goals. The WestMetro HOME Consortium exceeded anticipated outcomes in tenant based rental assistance, rehabilitation of existing units, and production of affordable units. Additionally, the City designed and administered a Small Business Recovery Grant program, partnered with a regional CHDO to provide temporary housing assistance to lower-income households, and contracted with human and homeless service providers to quickly respond to the COVID crisis with effective programming funded by the CARES Act. Actions and strategies to position the City and the WestMetro HOME Consortium to continue to address these goals as well as the other goals in the FY21-25 Consolidated Plan are identified in CR-20: Affordable Housing and CR-45: CDBG.

During FY21, funding was allocated to various projects designed to provide direct services, remove architectural barriers, and improve accessibility for low-and-moderate income individuals, families and traditionally underserved populations. Efforts included the completion of the FY20 Park Pathway project, which installed accessible park pathways at Auburndale Park, West Newton Commons, and Weeks Fields. The pathways connected the park entrances to

the park amenities. The City also completed the construction of a seven ADA accessible curb cuts on Watertown Street. Project construction on Phase I of the Marty Sender Trail Installation was ongoing in FY21 and is scheduled to be complete in FY22.

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

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

The WestMetro HOME Consortium ensures that all HOME-assisted projects comply with applicable requirements of the Lead-Based Paint Poisoning Prevention Act, 42 U.S.C. 4821, et. seq.; Residential Lead-Based Paint Hazard Reduction Act of 1992 and all future revisions and amendments, as well as, comply with such Lead-Based Paint regulations as may be adopted pursuant to HOME Program regulations and with the requirements of the Massachusetts Lead Paint Statute, M.G.L. c.111, ss190-199A.

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

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

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

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

During FY20, the Division continued to strengthen its relationships with city departments, stakeholder groups, community organizations and City partners. Housing and Community Development Division (the Division) staff worked with the Fair Housing Committee to ensure fair and adequate housing options through community education and input on proposed affordable housing developments. Division staff also met with the Commission on Disability to identify accessibility needs and projects for funding, as well as report on ongoing accessibility improvements. The Planning and Development Board regularly reviews recommendations for the CDBG and HOME programs, developed through coordination with staff and these advisory committees, and render final funding recommendations to the Mayor. The City continued to collaborate with the recently reinvigorated Newton Housing Partnership, which plays a key role in carefully reviewing proposed projects seeking to create and preserve affordable housing within the Newton community. In combination, this system provides a strong link between the City and its citizens, nonprofit organizations, business owners and other community agencies.

Additionally, community and regional relationships are critical to streamlining housing development, leveraging project funds and meeting community needs. Division staff met regularly with the Newton Housing Authority to advance and prioritize projects and public housing needs. City staff also maintain collaborative efforts with nonprofit housing organizations, state agencies, and housing developers to increase affordable housing opportunities in Newton. As the lead community for the WestMetro HOME Consortium, Newton works with representatives from member communities to coordinate on administrative matters and to exchange project ideas and information. The City partners with these aforementioned entities, and state and federal-level agencies, to enhance the coordination of services and to leverage additional funding to better assist low- and moderate-income residents.

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

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

The Housing and Community Development Division (the Division) has focused on developing

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

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

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

Over the latter half of FY20, the Division staff began work on the next 5-year iteration of the Analysis of Impediments to Fair Housing Choice (AI). The AI is an assessment of state and local government's bylaws, ordinances, statutes, and administrative policies and local conditions that affect the location, availability, and accessibility of housing throughout the consortium. The Planning Department hired Barrett Planning Group and JM Goldson LLC Consulting to assist in the preparation of the FY21 – 25 AI on behalf of the WestMetro HOME Consortium. The AI is now complete, and Newton is working with the Consortium to implement the goals that are listed in the AI.

To this end, working groups were formed to focus on the various aspects of the AI. The Consortium communities pooled \$100,000 in administration funds to hire a consultant to complete testing throughout the Consortium communities. The Consortium is currently drafting an RFP. Concurrent with the completion of the Analysis of Impediments, Barrett Planning group was hired to complete a small study on the Local Preference Policy in Newton. The purpose of this project is to evaluate the effectiveness of and need for the City's existing "local preference" policy, which gives priority to Newton residents for access to affordable housing units. The study will also assess the potential barriers created by the policy.

In FY21 (FFY20), the Fair Housing Committee wrote a letter to the MA Department of Housing and Community Development (DHCD) regarding the Affirmative Fair Housing Marketing Period (AFHMP) Guidelines. The Fair Housing Committee's concern relates to the City's Local Action Units that are subject to DHCD's AFHMP Guidelines, specifically the advertising requirements that are triggered when a housing lottery is held. The guidelines state that advertisements should run a minimum of two times over a sixty day period and be designed to attract attention. However no specific instruction is given on when those ads must run within the sixty day period. The Committee is concerned that not specifying a date by which the first ad must run allows a developer or its agent to choose to run two ads during the last two weeks of the marketing period. In response, DHCD pointed to the review by the subsidizing agency as a safeguard against advertising practices that would undermine the goals of affirmative marketing. DHCD is currently reexamining the AFHMP Guidelines and will consider clarifying timing of affirmative marketing in the future.

Each community in the consortium works individually to promote fair housing and overcome impediments.

In FY21, the RHSO communities participated in the Consortium led Analysis of Impediments to Fair Housing Choice. The report was completed in FY21. RHSO communities will continue to be an active partner in implementing strategies to address the impediments to fair housing.

Brookline works with the Commission on Diversity, Inclusion, and Community Relations to promote fair housing. The Commission's mission is to support a welcoming environment by encouraging cooperation, tolerance, and respect among and by all persons who come in contact with the Town of Brookline by advancing, promoting and advocating for the human and civil rights of all through education, awareness, outreach and advocacy.

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

Building a Better Brookline is a coalition between the Commission of Diversity, Inclusion & Community Relations, the Housing Advisory Board, and The Economic Development Advisory Board.

The Framingham's Fair Housing Committee is diligently working on determining which projects to take on in 2021 that will address some of the issues identified in the Analysis of Impediments to Fair Housing. Additionally, the CD program will create a housing task force to better coordinate services within Framingham and/or regionally to address homelessness within the community.

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

Needham continues to provide additional outreach on housing issues through the Town website and a housing brochure. Both tools include important information and resources on fair housing. Moreover, the Needham Community Housing Specialist is working with other members of the WestMetro HOME Consortium on education and outreach strategies related to fair housing. They are pursuing the possibility of preparing a Public Service Announcement (PSA) to help educate the public in each community and across the region on fair housing issues. The Housing Specialist has reached out to representatives of other HOME Consortia in the State to see if they might also be interested in this outreach strategy and help commit resources.

The Waltham Housing Division provides portability in the HOME TBRA rental assistance programs it administers. Applicants are free to search for housing within Waltham, the HOME Consortium and or within the Balance of State if the eligible household cannot find housing of their choice in Waltham. The Housing Division also administers an existing CDBG housing rehabilitation program for lead paint abatement, weatherization, emergency, and accessibility improvements to assist elderly homeowners and renters to remain in their home and increases the range of housing options and related services for the elderly population. Waltham Housing Partnership was originally created to promote affordable housing within the City in the 1980's. This has now evolved into the Municipal Housing Trust. Trust members continue to work on affordable housing opportunities in Waltham.

Watertown's 2013 Analysis of Impediments identifies nine impediments to Fair Housing in Watertown: lack of knowledge among small landlords, lack of knowledge among realtors, lack

of knowledge among realtors, lack of knowledge/empowerment among housing seekers, restrictive zoning, lead paint issues in properties rented to families with children, lack of development sites, low vacancy rates, high cost of housing, and language barriers. The Town has made annual progress addressing these barriers through a variety of actions, including:

- The Watertown Housing Partnership, in concert with social service agencies, has continued to raise awareness of fair housing laws and complaint procedures through trainings, and by ensuring that Inclusionary Zoning and Housing Authority units are properly distributed by lottery. In 2021, the Town created a system for collecting and tracking fair housing complaints and posted it on the Town website.
- With the goal of encouraging developers to create more accessible units, Watertown passed new Design Standards (2015) that encourage Universal Design concepts in smaller projects, and require them in larger ones.
- The Town continues to seek increased diversity on the various permit-granting and policy-making boards as terms expire and vacancies arise.

## **CR-40 - Monitoring 91.220 and 91.230**

**Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements**

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

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

Due to the COVID-19 Pandemic, HOME monitoring was significantly delayed. The WestMetro HOME Consortium applied for and was granted a HUD COVID-19 Waiver suspending on-site reviews and monitoring of HOME projects until December 31, 2020. These waivers were extended by HUD until September 30, 2021, which affects the FY20 HOME monitoring. Since the prior FY19 HOME monitoring was significantly delayed due to the COVID-10 Pandemic, FY20 HOME monitoring also began later than anticipated. Newton is currently conducting the FY20 monitoring. Remaining inspections will be completed prior to the September 30, 2021 deadline with FY21 required inspections occurring later in FY22.

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

While a minimum of ten percent of all human service and ESG projects are required to be monitored each year, forty-two percent of Newton's human service portfolio and forty-four percent of Newton's ESG portfolio were identified for monitoring for the beginning of FY21.



The five human service projects (42%) and seven ESG projects (44%) were monitored in June and July of 2021.

**Citizen Participation Plan 91.105(d); 91.115(d)**

**Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.**

The draft Consolidated Annual Performance and Evaluation Report (CAPER) was posted to the City's website on September 1, 2021. It will be presented at the Annual Performance Public Hearing on September 13, 2021, 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 13 through September 27, 2021). According to the City's Citizen Participation Plan, copies of the CAPER will be made available in other formats and in other languages upon request. In addition, notice of the draft CAPER's availability and the date of the Annual Performance Hearing was included in the Planning and Development Department's weekly report that is distributed digitally to several hundred recipients, including local nonprofits and other organizations serving low- and moderate-income individuals and minorities. A notice for the public hearing was published in the Newton TAB, as well as in the newspapers of the twelve other WestMetro HOME Consortium communities during the week of August 29, 2021. The notice provided contact information for the City's ADA Coordinator, and telecommunications relay service, for anyone that sought to request a reasonable accommodation.

## **CR-45 - CDBG 91.520(c)**

**Specify the nature of, and reasons for, any changes in the jurisdiction's program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.**

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

Consistent with the City's desire to address the need for affordable housing through a programmatic funding shift, \$1,223,620 in FY21 CDBG funds were allocated toward the development and rehabilitation of affordable housing. The Newton Housing Authority's (NHA) Haywood House project closed on its Low Income Housing Tax Credit financing in the Spring of FY21. As a result, construction has commenced with an anticipated completion in the Fall of 2022. The Project, which was awarded FY20 and FY21 CDBG funds, will create 55 new affordable rental units for seniors. The CDBG-funded project: 236 Auburn Street, created three affordable family rental units and a five-bedroom congregate home for persons with severe disabilities. Construction was completed at 236 Auburn Street in FY20 (FFY19) and the project is now fully occupied and closed out.

In FY21, the Planning Department, through the assistance of Barrett Planning Group and JM Goldson LLC Consulting, completed the FY21 – 25 iteration of the Analysis of Impediments to Fair Housing Choice (AI) on behalf of the WestMetro Consortium. Near the end of FY21, the Consortium voted to award HOME Consolidated Pool funds to fund one of the AI's recommendation: the hiring of a fair housing consultant to conduct fair housing testing throughout the Consortium over the course of a two-year period. The testing will occur in FY22.

The Division continued to work with its full-time ADA Coordinator. This position staffs the Commission on Disability, which provides project recommendations for the CDBG-funded architectural access program. The ADA Coordinator is also a valuable resource for ensuring that both City and CDBG access projects comply with state and federal accessibility regulations and guidelines. The City completed seven ADA accessible curb cuts and a park pathway project in FY21. Not only did these projects remove architectural and material barriers, but they improved accessibility and mobility for persons with disabilities.

In FY21, the City also received and administered CDBG-CV and ESG-CV funds through the CARES Act to prevent, prepare for, and respond to COVID-19. CDBG-CV funds were allocated to three programs: COVID-19 Emergency Housing Relief, Small Business Recovery (SBR) Grant Program, and Human Services. The Emergency Housing Relief program assisted 250 households with mortgage and rental support (although it was not closed out until FY22). A total of 94 businesses were awarded grants through the SBR program; 15 of these loans were closed-out in FY21. Three of the human service CV programs, those administered by NCDF, the Barry Price Center, and the Newton Housing Authority, were completed in FY21. These activities served a total of 1,228 people. The remaining seven projects are expected to be complete in FY22.

## **CR-50 - HOME 91.520(d)**

**Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations**

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

- Myrtle Village, Unit 16, Newton
- Myrtle Village, Unit 24, Newton
- 10 Cambria Road, Newton
- 390 Newtonville Ave, Newton\*
- 90 Christina Street, Unit 1, Newton
- 90 Christina Street, Unit 2, Newton
- 90 Christina Street, Unit 3, Newton
- 90 Christina Street, Unit 4, Newton
- 90 Christina Street, Unit 5, Newton
- 61 Pearl Street, Unit 1, Newton\*
- 61 Pearl Street, Unit 2, Newton\*
- 61 Pearl Street, Unit 3, Newton\*
- 1 Ashby Place, Unit C8, Bedford
- 1 Ashby Place, Unit F3, Bedford
- 1 Ashby Place, Unit B6, Bedford
- 1 Ashby Place, Unit 1A, Bedford
- The Coolidge at Sudbury, 187 Boston Post Road, Unit 102, Sudbury
- The Coolidge at Sudbury, 187 Boston Post Road, Unit 203, Sudbury
- 10 Judges Road, Lexington
- 12 Judges Road, Lexington
- 15 Judges Road, Lexington

\* These properties did not pass inspection. However, they are included in the NHA CAN-DO Portfolio that will be rehabilitated in the first half of FY22. Inspection failures are being included in the scope of work for the scheduled rehab work. The other HOME projects listed passed inspection.

Newton completed a FY20 HOME Risk Assessment that was submitted to the WestMetro Consortium. Since the prior FY19 HOME monitoring was significantly delayed due to the COVID-10 Pandemic, FY20 HOME monitoring also began later than anticipated. Newton is currently conducting the FY20 monitoring.

As the WestMetro HOME Consortium was granted the HUD COVID-19 Waiver that suspended on-site inspections of HOME projects until September 30, 2021, Newton is coordinating the completion of inspections that were scheduled to occur in FY20. The above list reflects those FY20 inspections that Newton was able to complete in FY21. Remaining inspections will be completed prior to the September 30, 2021 deadline with FY21 required inspections occurring later in FY22. Newton has been reviewing the monitoring submitted by those Consortium

communities who have been able to monitor identified projects electronically with the goal of completing the monitoring of FY20.

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

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

Each community's approach and oversight varies. For example in Bedford, the Bedford Housing Partnership reviews and approves all marketing plans for developments with affordable units, for compliance with the appropriate regulations. The Coolidge at Sudbury II utilized an AFHMP that meet both the Consortium guidelines and the State 40B Guidelines for the initial and ongoing leasing of units. For all communities, a large component of the marketing plan requires the developer to specifically list all of the methods they will use to affirmatively market the units. For HOME assisted units that are state-funded public housing units, Massachusetts regulation 760 CMR 5 outlines eligibility and selection criteria. The Common Housing Application for Massachusetts Public Housing (CHAMP) application system is used for these units. Brookline utilizes an extensive list of outreach methods required for affirmatively marketing new affordable units to ensure that persons in the housing market, who are not likely to apply for housing in Brookline, have access to the information. This includes advertising in local minority newspapers, and direct mailings to local community organizations, churches and synagogues as well as email distribution to a listserve of over 4,000 households interested in affordable housing opportunities in Brookline.

In the Town of Belmont, the marketing of the 12 affordable units at the Bradford (formerly Cushing Village) followed the approved fair marketing plan. Unfortunately, the informational meetings, as well as the lottery, were originally scheduled to be in person, but with the COVID epidemic, all meetings and the lottery were sifted to virtual. DHCD approved the revised plan and all involved tried to spread the word of this change. Ultimately, 61 applications were submitted and the successful residents began to move into their units at the end of July 2020. Additionally, as a result of COVID, the Town reallocated \$250,000 housing construction CPA funding to emergency rental assistance. The Housing Trust contracted with Metro West Community Developers to implement and administer this program. The MWCD has been

actively following the approved fair marketing plan.

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

The Town of Natick, under sweeping new affordable housing provisions in its zoning bylaw, requires developers who offer affordable homes through a special permit process to adhere to standard affirmative marketing procedures mandated by the Massachusetts Department of Housing & Community Development (DHCD). These procedures include minority outreach and a fair lottery process to select renters or buyers. Natick will continue to encourage the inclusion of minority and women owned enterprises in HOME funded activities, consistent with 24 CFR 92.350.

The Needham Housing Specialist continues to review all Affirmative Fair Housing Marketing Plans for new projects. This will include a plan related to redevelop a former assisted living and skilled nursing facility at 100-110 West Street into a mixed senior living development. This project, The Residence at Carter Mill, will include an 83-unit assisted living and Alzheimer's/memory care facility and 72 independent living apartments. As required by local zoning, 12.5% of the total independent living units must be affordable to low- or moderate-income households.

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

Watertown has a Capital Improvements policy (2015) that is consistent with that of the HOME

Consortium and the Department of Housing and Community Development. All of the 11 remaining legacy HOME-assisted American Dream Downpayment Assistance Loans have a recapture provision which is consistent with that of the HOME Consortium. Many of these loans have clauses that give the Town the right of first refusal to purchase, and require the seller to make a good-faith attempt to find an income-eligible buyer. In the latter case, Town staff meet with the seller to ensure that they work with a firm or nonprofit (such as MetroWest Collaborative Development) to market the unit in a manner consistent with fair housing requirements. Also, in the few cases where the Affordable Housing Restriction does not mandate an attempt to market the unit to an income-eligible buyer, the Town has an increase recapture percentage, to recover additional monies from a market rate sale. All monies recaptured are returned to the West Metro HOME Consortium as program income.

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

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

In FY21, the Consortium receipted \$356,935.95, of which \$18,958.01 was recorded as PI. (\$337,997.94 was receipted as HP, recaptured homebuyer loan program income, which is not eligible for PA conversion.) \$1,895.80 in PA subfunds were created from the total PI receipts which equals 10% of the PI for the use of HOME program administration. Per the Mutual Cooperation Agreement and FY21 Subrecipient Agreements, 70% of the subfunded PA funds are retained by the community that originated the program income. 30% of the subfunded PA funds will go to support Consortium Administration.

Program income was utilized for the following projects and programs during FY21:

- Bedford: Ashby Place, \$9,825.73 in program income
- Lexington: LHA Pine Grove, \$6,039.10 in program income
- Natick HOME Administration, \$1,895.80 in program income (PA funds)
- HM20 Wayland TBRA Program, \$1,919.97 in program income
- HM20 Waltham TBRA Program, \$100,210.27 in program income
- HM20-21 Framingham TBRA Program, \$103,420 in program income

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

these detailed expenditures.

**Describe other actions taken to foster and maintain affordable housing. 91.220(k) (STATES ONLY: Including the coordination of LIHTC with the development of affordable housing). 91.320(j)**

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

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



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

### ESG Supplement to the 2021 CAPER

#### For Paperwork Reduction Act

### CR-60 Subrecipients Awards

Please complete table:

Project	FY21 ESG Award
Brookline Community Mental Health Center	\$73,053.95
Homelessness Prevention	\$49,670.78
Rapid Re-housing	\$23,383.17
Community Day Center of Waltham – Shelter Services	\$16,500.00
REACH Beyond Domestic Violence	\$26,850.00
Emergency Shelter Operations	\$21,250.00
HMIS Comparable Database	\$5,600.00
The Second Step	\$27,750.00
Transitional Residence Operations	\$21,250.00
Homelessness Prevention	\$6,500.00
Middlesex Human Service Agency – Bristol Lodge	\$11,000.00

### 1. Recipient Information—All Recipients Complete

#### Basic Grant Information

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

#### ESG Contact Name

Prefix	Mrs
First Name	SHAYLYN
Middle Name	0
Last Name	DAVIS
Suffix	0

**Title** Senior Community Development Planner

**ESG Contact Address**

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

**ESG Secondary Contact**

**Prefix** Mrs  
**First Name** DANIELLE  
**Last Name** BAILEY  
**Suffix** 0  
**Title** Grants Manager  
**Phone Number** 6177961156  
**Extension** 0  
**Email Address** dbailey@newtonma.gov

**2. Reporting Period—All Recipients Complete**

**Program Year Start Date** 07/01/2020  
**Program Year End Date** 06/30/2021

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

**Subrecipient or Contractor Name:** NEWTON  
**City:** Newton Centre  
**State:** MA  
**Zip Code:** 02459, 1449  
**DUNS Number:** 076576826  
**Is subrecipient a victim services provider:** N  
**Subrecipient Organization Type:** Unit of Government  
**ESG Subgrant or Contract Award Amount:** 12,580.05

**Subrecipient or Contractor Name:** BROOKLINE COMMUNITY MENTAL HEALTH CENTER

**City:** Brookline

**State:** MA

**Zip Code:** 02445, 4445

**DUNS Number:** 097444186

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$60,210

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

**City:** Waltham

**State:** MA

**Zip Code:** 02454, 0024

**DUNS Number:** 781777412

**Is subrecipient a victim services provider:** Y

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$23,000

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

**City:** Waltham

**State:** MA

**Zip Code:** 02454, 1066

**DUNS Number:** 791377612

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** \$69,150

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

### 10. Shelter Utilization

Number of New Units - Rehabbed	0
Number of New Units - Conversion	0
Total Number of bed-nights available	14,235
Total Number of bed-nights provided	13,927
Capacity Utilization	98%

**Table 13 – Shelter Capacity**

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

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

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

# APPENDIX

### FY21 Goals with Zero Completion

Community	Name of Goal	Goal Outcome Indicator (GOI)	GOI Unit of Measure	Outcome Expected FY20	Actual Outcome FY20	Notes
Belmont	Housing Production	Rental Units Constructed	Housing Units	2	0	In the fall of 2020, Belmont's planner of 30 years passed away. At that time, there was no other professional planning staff member that could move along any of the progress he was doing as a representative of the town to the WestMetro Consortium. A planner started in mid-May 2021. He has been busy evaluating where things were left off and where progress could be made toward the agreed housing goals listed in the FY21-25 Plan.
Newton	Rehabilitation of Existing Units	Rental Units Rehabbed	Household Housing Units	25	0	The Pandemic affected the ability of the NHA and the City to complete the rehabilitation work on the 33-unit CAN-DO Portfolio. Instead of completing the work in FY21, the City anticipates the work to occur and be completed in FY22.
Newton	Preservation of Affordable Units	Units Preserved	Household Housing Units	25		
Natick	Rental Assistance	Tenant-based rental assistance/rapid rehousing	Households assisted	3	0	The Natick Service Council revamped the TBRA program to better achieve this goal in FY22.

### FY21 Goals with Zero Completion

Community	Name of Goal	Goal Outcome Indicator (GOI)	GOI Unit of Measure	Outcome Expected FY20	Actual Outcome FY20	Notes
HOME Consortium	Rehabilitation of Existing Units	Homeowner Housing Rehabbed	Household Housing Units	3	0	The three rehabilitated units were expected to be completed by Framingham in FY21. However, the pandemic, lack of housing rehab applications, and the multi-family housing moratorium, enacted by the City Council in September 2020, spurred Framingham to rethink the City's federal funding strategy for program year 2020. In response to housing emergencies caused by the pandemic, all of the Framingham's HOME funds were reallocated to the Tenant-Based Rental Assistance (TBRA) program.

## WestMetro HOME Consortium Public Housing Authority Projects

Project Name	Total Development Budget	Total HOME Funds	HOME Units	Total Units	HOME Funds Expended in FY21	Project Status
Bedford Ashby Place	\$5,957,100	\$58,075	2	80	\$16,921.88	Underway
Newton Haywood House	\$30,138,854	\$450,000 (DHCD HOME)	11	55	\$0	Underway
Brookline: Morse Apartments	\$49,535,989	\$452,927	3	98	\$128,330.00	Underway
Lexington Pine Grove	\$486,674	\$120,782.00	3	5	\$114,742.90	Underway



## **Monitoring Policies and Procedures for the City of Newton and the WestMetro HOME Consortium**

### *Human Services*

Annually, during the third quarter of each program year, Division staff monitors human service subrecipient agencies. All new projects are monitored during the first year of operation. Existing agencies/projects are selected based on the results of a risk analysis. At least ten percent of all human service projects are monitored each year. The monitoring process includes the following documentation:

- Risk analysis results and monitoring schedule,
- Notification letter sent to subrecipient agency,
- On-site monitoring visit documentation, including completion of steps outlined in the attached monitoring agenda, and
- Letter to the agency that outlines the result of the monitoring visit, including any follow up action required. All monitoring documentation shall be filed in the “monitoring” folder within the project file.

Although only a minimum of ten percent of all human service projects must be monitored each year, fifty percent of the Newton human service portfolio was monitored during FY17. Two of the eight monitored projects were found to be out of compliance with City of Newton and HUD CDBG human service program regulations. Official notification was sent to these agencies requiring mandatory payback of CDBG funds based on the proportion of low-to-moderate income served by the respective activity undertaken.

### *HOME/CDBG Housing Development Projects*

Staff monitors every rental project assisted with HOME funds on an annual basis and does an on-site file review of CDBG-funded projects biennially. Except for HOME projects, staff does not conduct on-site file reviews of projects monitored by MassHousing, the MA Department of Housing and Community Development or other approved monitoring agencies. In these cases, staff contacts property managers or owners to verify that an annual inspection was conducted and requests written results of the monitoring visit.

In general, the monitoring process includes the following steps:

- Perform risk analysis if project is CDBG-funded and is not scheduled to be monitored. The risk analysis considers criteria such as past performance of the agency/project, experience level of staff administering the project, project-specific factors such as number of units and funding sources, and program complexity;
- Develop monitoring schedule based on risk analysis and if a project is funded with HOME or CDBG funds;
- Send letter notifying owner that units will be monitored for CDBG/HOME compliance and compliance with sub-recipient agreement. The letter identifies the date and time of the monitoring visit and identifies specific items to be monitored (i.e. income limit documentation, lease agreements, unit inspection

- results, performance goals, if applicable, etc.);
- Complete on-site monitoring visit including completion of the following forms, as applicable: Lease Requirements Checklist, Housing Quality Standards inspection form, and CDBG or HOME Checklist Monitoring Form, including compliance with timely expenditure of funds, comprehensive planning, and minority business outreach as applicable;
- Send letter to the owner outlining the result of the monitoring visit including any follow-up action required.

#### *WestMetro HOME Consortium*

In order to ensure accountability, respond to community needs, and use HOME resources efficiently and effectively, the WestMetro HOME Consortium follows the comprehensive monitoring plan outlined below.

#### *Monitoring Objectives and Strategy*

The same risk-analysis and notification protocol identified above is used by the WestMetro HOME Consortium. Overall monitoring objectives of the HOME Consortium monitoring plan include:

- Identifying and tracking program and project results;
- Identifying technical assistance needs of member communities, CHDOs, and subrecipient staff;
- Ensuring timely expenditure of HOME funds, as well as compliance with comprehensive planning, and minority business outreach as applicable;
- Documenting compliance with program rules;
- Preventing fraud and abuse; and
- Identifying innovative tools and techniques that support affordable housing goals.

To ensure an appropriate level of staff effort, the Consortium's monitoring strategy involves a two-pronged approach – ongoing monitoring and on-site monitoring.

#### *Ongoing Monitoring*

Ongoing monitoring occurs for all HOME-assisted activities each program year. Basic ongoing monitoring involves the review of activities to ensure regulatory compliance and track program performance. Particular attention is paid to the consistent use of the Consortium's Project and IDIS Setup and Completion forms, and Comprehensive Project Checklists. At least annually, the Consortium assesses the financial condition of HOME-assisted rental projects with ten or more HOME-assisted units to determine the continued financial viability of the project.

#### *On-Site Monitoring*

On-site monitoring seeks to closely examine whether performance or compliance problems exist and to identify the aspects of the program or project that are contributing to the adverse situation. A risk factor analysis is used to target certain HOME program areas or organizations for in-depth monitoring each year. Results of the monitoring are documented in HUD-provided

HOME Monitoring checklists and reviewed with staff of the city/town. Any findings are discussed and a course of action is developed to resolve the problem going forward.

The Consortium uses a consultant with expertise in the HOME Final Rule to conduct the on-site monitoring of the HOME Consortium member communities.

## HOME Program Income Expenditures in IDIS in FY21

Project Number	Project Name	Sum of PI \$
HM20-01C / 3450	Bedford: Ashby Place	\$9,825.73
HM20-12B / 3584	Lexington- LHA Pine Grove	\$6,039.10
HM20-14B4 / 3587	Wayland SDAP: 58 Jennings Road #4	\$1,919.97
HM20-7B01 / 3639	Waltham SDAP: 174 Summer Street	\$4,100.00
HM20-7B04 / 3639	Waltham SDAP: 387 River Street	\$3,875.00
HM20-7B05 / 3639	Waltham SDAP: 68 Hall Street #1	\$2,462.00
HM20-7B06 / 3639	Waltham SDAP: 89 Trapelo Road #27	\$2,425.00
HM20-7B07 / 3639	Waltham SDAP: 41 Warren Street #2-3	\$4,275.00
HM20-7B08 / 3639	Waltham SDAP: 60 Hope Avenue #103	\$4,575.00
HM20-7B09 / 3639	Waltham SDAP: 24 Garden Circle #7	\$2,289.00
HM20-7B10 / 3639	Waltham SDAP: 62-2 School Avenue	\$3,180.00
HM20-7B11 / 3639	Waltham SDAP: 51 Lake Street #202	\$2,243.00
HM20-7B12 / 3639	Waltham SDAP: 710 Main Street #A314	\$851.00
HM20-7B13 / 3639	Waltham SDAP: 51 Lake Street #301	\$2,243.00
HM20-7B14 / 3639	Waltham SDAP: 30B Amory Road	\$3,775.00
HM20-7B15 / 3639	Waltham SDAP: 58-2 Robbins Street	\$2,575.00
HM20-7B16 / 3639	Waltham SDAP: 20 C Lexington Terrace	\$2,216.00
HM20-7B17 / 3639	Waltham SDAP: 18 Pearl Street	\$2,084.00
HM20-7B18 / 3639	Waltham SDAP: 12 Peirce Street	\$3,875.00
HM20-7BA / 3591	Waltham TBRA: 20 Cooper Street #446	\$5,733.00
HM20-7BB / 3607	Waltham TBRA: 356 Lincoln Street #3	\$8,955.00
HM20-7BC / 3681	Waltham TBRA: 368 Lincoln Street #6	\$11,741.27
HM20-7BD / 3580	Waltham TBRA: 26 Middlesex Circle #7	\$5,684.00
HM20-7BE / 3581	Waltham TBRA: 24 Middlesex Circle #10	\$4,977.00
HM20-7BF / 3683	Waltham TBRA: 71 Westland Avenue, Unit G-3	\$10,110.00
HM20-7BG / 3583	Waltham TBRA: 22 Middlesex Circle #7	\$5,967.00
HM20-9C01 / 3682	Framingham SDAP: 266 Waverly Street #359	\$1,299.00
HM20-9C03 / 3682	Framingham SDAP: 43 Frederick St #1F	\$1,752.00
HM20-9C04 / 3682	Framingham SDAP: 55 Dinsmore Avenue #610	\$2,445.00
HM20-9C05 / 3682	Framingham SDAP: 34 Salem End Road #7B	\$1,800.00
HM20-9C06 / 3682	Framingham SDAP: 1620 Worcester Road Unit B550	\$1,597.00
HM20-9C07 / 3682	Framingham SDAP: 19C Interfaith Terrace	\$1,906.00
HM20-9C08 / 3682	Framingham SDAP: 307 Windsor Drive	\$2,350.00
HM20-9C09 / 3682	Framingham SDAP: 15 Paris Street	\$4,850.00
HM20-9C10 / 3682	Framingham SDAP: 14 Webster Street	\$3,100.00
HM20-9CA / 3684	Framingham TBRA: 13 West Street #1	\$13,206.00

HM20-9CB / 3685	Framingham TBRA: 90 Second Street #5	\$11,246.00
HM20-9CC / 3691	Framingham TBRA: 8 Grant Street #23	\$17,850.00
HM20-9CD / 3693	Framingham TBRA: 17 Damon Street #1	\$5,780.00
HM20-9CE / 3694	Framingham TBRA: 16 Eames Street #1	\$9,950.00
HM20-9CF / 3695	Framingham TBRA: 90 Second Street #14	\$7,342.00
HM20-9CG / 3718	Framingham TBRA: 67 Georgetown Drive #4	\$5,192.00
HM21-11A / 3672	Natick HOME Administration	\$1,895.80
HM21-9C01 / 3725	Framingham SDAP: 59 Fountain Street #320	\$953.00
HM21-9CB / 3722	Framingham TBRA: 64 Grove Street #1	\$8,536.00
HM21-9CC / 3693	Framingham TBRA: 17 Damon Street #1	\$2,266.00
	<b>TOTAL HOME PROGRAM INCOME EXPENDED IN FY21</b>	<b>\$223,310.87</b>



HUD ESG CAPER FY2020

Grant: **ESG: Newton - MA - Report**    Type: **CAPER**

Report Date Range

7/1/2020 to 6/30/2021

Q01a. Contact Information

First name	Shaylyn
Middle name	
Last name	Davis
Suffix	
Title	
Street Address 1	1000 Commonwealth Ave.
Street Address 2	
City	Newton
State	Massachusetts
ZIP Code	02459
E-mail Address	sdavis@newtonma.gov
Phone Number	(617)796-1125
Extension	
Fax Number	()-

Q01b. Grant Information

As of 7/23/2021

Fiscal Year	Grant Number	Current Authorized Amount	Total Drawn	Balance	Obligation Date	Expenditure Deadline
2020	E20MC250019	\$167,734.00	\$100,512.49	\$67,221.51	9/4/2020	9/4/2022
2019	E19MC250019	\$162,765.00	\$162,765.00	\$0	7/23/2019	7/23/2021
2018	E18MC250019	\$156,262.00	\$156,262.00	\$0	9/19/2018	9/19/2020
2017	E17MC250019	\$275,072.00	\$275,072.00	\$0	10/19/2017	10/19/2019
2016	E16MC250019	\$159,211.00	\$159,211.00	\$0	8/3/2016	8/3/2018
2015	E15MC250019	\$159,511.00	\$159,511.00	\$0	7/22/2015	7/22/2017
2014	E14MC250010	\$143,202.00	\$143,202.00	\$0	7/25/2014	7/25/2016
2013	E13MC250010	\$123,041.00	\$123,041.00	\$0	9/20/2013	9/20/2015
2012						
2011						
Total		\$1,346,798.00	\$1,279,576.49	\$67,221.51		

ESG Information from IDIS

CAPER reporting includes funds used from fiscal year:

2020

Project types carried out during the program year

Enter the number of each type of projects funded through ESG during this program year.

Street Outreach	0
Emergency Shelter	3
Transitional Housing (grandfathered under ES)	1
Day Shelter (funded under ES)	1
Rapid Re-Housing	1
Homelessness Prevention	2

Q01c. Additional Information

HMIS

Comparable Database

Are 100% of the project(s) funded through ESG, which are allowed to use HMIS, entering data into HMIS?	Yes
Have all of the projects entered data into Sage via a CSV - CAPER Report upload?	Yes
Are 100% of the project(s) funded through ESG, which are allowed to use a comparable database, entering data into the comparable database?	Yes
Have all of the projects entered data into Sage via a CSV - CAPER Report upload?	Yes

Q04a: Project Identifiers in HMIS

Organization Name	Organization ID	Project Name	Project ID	HMIS Project Type	Method for Tracking ES	Affiliated with a residential project	Project IDs of affiliations	CoC Number	Geocode	Victim Service Provider	HMIS Software Name	Report Start Date	Report End Date	CSV Exception?	Uploaded via emailed hyperlink?
The Second Step	1	Homelessness Prevention (ESG)	4	12	0			MA-516	259017	1	Clarity HS	2020-07-01	2021-06-30	No	Yes
The Second Step	1	Emergency Shelter Services (ESG)	1	2	0			MA-516	259017	1	Clarity HS	2020-07-01	2021-06-30	No	Yes
Brookline Com Mental Health	117	Newton ESG Prevention	2429	12				MA-516	251650	0	ETO	2020-07-01	2021-06-30	No	Yes
Brookline Com Mental Health	117	Newton ESG RRH	2771	13				MA-516	251650	0	ETO	2020-07-01	2021-06-30	No	Yes
REACH	9182017	Emergency Shelter	ESG123	1	0	0	0	MA-516	252544	1	EmpowerDB	2020-07-01	2021-06-30	No	Yes
Community Day Center of Waltham	314	Community Day Center ESG	2675	11				MA-516	252544	0	ETO	2020-03-10	2021-06-15	No	Yes
Middlesex Human Service Agency	217	Bristol Lodge Womens Shelter	1483	1	3			MA-516	252544	0	ETO	2020-07-01	2021-06-30	No	Yes
Middlesex Human Service Agency	217	Bristol Lodge Mens Shelter	1482	1	3			MA-516	252544	0	ETO	2020-07-01	2021-06-30	No	Yes

Q05a: Report Validations Table

Total Number of Persons Served	516
Number of Adults (Age 18 or Over)	481
Number of Children (Under Age 18)	35
Number of Persons with Unknown Age	0
Number of Leavers	404
Number of Adult Leavers	389
Number of Adult and Head of Household Leavers	389
Number of Stayers	112
Number of Adult Stayers	92
Number of Veterans	22
Number of Chronically Homeless Persons	66
Number of Youth Under Age 25	13
Number of Parenting Youth Under Age 25 with Children	3
Number of Adult Heads of Household	272
Number of Child and Unknown-Age Heads of Household	0
Heads of Households and Adult Stayers in the Project 365 Days or More	22

Q06a: Data Quality: Personally Identifying Information (PII)

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
Name	0	0	2	2	0.39 %
Social Security Number	69	192	4	265	51.36 %
Date of Birth	1	3	9	13	2.52 %
Race	2	5	0	7	1.36 %
Ethnicity	0	3	0	3	0.58 %
Gender	0	0	0	0	0.00 %
Overall Score				278	53.88 %

Q06b: Data Quality: Universal Data Elements

	Error Count	% of Error Rate
Veteran Status	4	0.83 %
Project Start Date	0	0.00 %
Relationship to Head of Household	206	39.92 %
Client Location	6	2.21 %
Disabling Condition	249	48.26 %

Q06c: Data Quality: Income and Housing Data Quality

	Error Count	% of Error Rate
Destination	288	71.29 %
Income and Sources at Start	215	79.04 %
Income and Sources at Annual Assessment	4	18.18 %
Income and Sources at Exit	224	57.58 %

Q06d: Data Quality: Chronic Homelessness

	Count of Total Records	Missing Time in Institution	Missing Time in Housing	Approximate Date Started DK/R/missing	Number of Times DK/R/missing	Number of Months DK/R/missing	% of Records Unable to Calculate
ES, SH, Street Outreach	113	0	0	11	24	18	23.89 %
TH	7	0	0	0	1	1	14.29 %
PH (All)	5	0	0	0	0	0	0.00 %
Total	125	0	0	0	0	0	22.40 %

Q06e: Data Quality: Timeliness

	Number of Project Start Records	Number of Project Exit Records
0 days	56	184
1-3 Days	66	1
4-6 Days	13	2
7-10 Days	11	1
11+ Days	33	216

Q06f: Data Quality: Inactive Records: Street Outreach & Emergency Shelter

	# of Records	# of Inactive Records	% of Inactive Records
Contact (Adults and Heads of Household in Street Outreach or ES - NBN)	29	0	0.00 %
Bed Night (All Clients in ES - NBN)	29	5	17.24 %

Q07a: Number of Persons Served

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Adults	481	456	25	0	0
Children	35	0	34	1	0
Client Doesn't Know/ Client Refused	0	0	0	0	0
Data Not Collected	0	0	0	0	0
Total	516	456	59	1	0
For PSH & RRH – the total persons served who moved into housing	2	2	0	0	0

Q08a: Households Served

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Total Households	272	250	22	0	0
For PSH & RRH – the total households served who moved into housing	2	2	0	0	0

Q08b: Point-in-Time Count of Households on the Last Wednesday

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
January	86	76	10	0	0
April	71	57	14	0	0
July	88	82	6	0	0
October	81	73	8	0	0

Q09a: Number of Persons Contacted

	All Persons Contacted	First contact – NOT staying on the Streets, ES, or SH	First contact – WAS staying on Streets, ES, or SH	First contact – Worker unable to determine
Once	0	0	0	0
2-5 Times	0	0	0	0
6-9 Times	0	0	0	0
10+ Times	0	0	0	0
Total Persons Contacted	0	0	0	0

Q09b: Number of Persons Engaged

	All Persons Contacted	First contact – NOT staying on the Streets, ES, or SH	First contact – WAS staying on Streets, ES, or SH	First contact – Worker unable to determine
Once	0	0	0	0
2-5 Contacts	0	0	0	0
6-9 Contacts	0	0	0	0
10+ Contacts	0	0	0	0
Total Persons Engaged	0	0	0	0
Rate of Engagement	0.00	0.00	0.00	0.00



Q10a: Gender of Adults

	Total	Without Children	With Children and Adults	Unknown Household Type
Male	334	329	5	0
Female	143	123	20	0
Trans Female (MTF or Male to Female)	1	1	0	0
Trans Male (FTM or Female to Male)	0	0	0	0
Gender Non-Conforming (i.e. not exclusively male or female)	3	3	0	0
Client Doesn't Know/Client Refused	0	0	0	0
Data Not Collected	0	0	0	0
Subtotal	481	456	25	0

Q10b: Gender of Children

	Total	With Children and Adults	With Only Children	Unknown Household Type
Male	19	18	1	0
Female	16	16	0	0
Trans Female (MTF or Male to Female)	0	0	0	0
Trans Male (FTM or Female to Male)	0	0	0	0
Gender Non-Conforming (i.e. not exclusively male or female)	0	0	0	0
Client Doesn't Know/Client Refused	0	0	0	0
Data Not Collected	0	0	0	0
Subtotal	35	34	1	0

Q10c: Gender of Persons Missing Age Information

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Male	0	0	0	0	0
Female	0	0	0	0	0
Trans Female (MTF or Male to Female)	0	0	0	0	0
Trans Male (FTM or Female to Male)	0	0	0	0	0
Gender Non-Conforming (i.e. not exclusively male or female)	0	0	0	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected	0	0	0	0	0
Subtotal	0	0	0	0	0

Q10d: Gender by Age Ranges

	Total	Under Age 18	Age 18-24	Age 25-61	Age 62 and over	Client Doesn't Know/ Client Refused	Data Not Collected
Male	353	19	18	274	42	0	0
Female	159	16	7	125	11	0	0
Trans Female (MTF or Male to Female)	1	0	0	1	0	0	0
Trans Male (FTM or Female to Male)	0	0	0	0	0	0	0
Gender Non-Conforming (i.e. not exclusively male or female)	3	0	0	3	0	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0	0	0
Data Not Collected	0	0	0	0	0	0	0
Subtotal	516	35	25	403	53	0	0

Q11: Age

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Under 5	15	0	15	0	0
5 - 12	13	0	13	0	0
13 - 17	7	0	6	1	0
18 - 24	25	21	4	0	0
25 - 34	80	69	11	0	0
35 - 44	92	87	5	0	0
45 - 54	132	127	5	0	0
55 - 61	99	99	0	0	0
62+	53	53	0	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected	0	0	0	0	0
Total	516	456	59	1	0

Q12a: Race

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
White	357	341	16	0	0
Black or African American	109	88	20	1	0
Asian	21	6	15	0	0
American Indian or Alaska Native	2	2	0	0	0
Native Hawaiian or Other Pacific Islander	5	5	0	0	0
Multiple Races	15	7	8	0	0
Client Doesn't Know/Client Refused	2	2	0	0	0
Data Not Collected	5	5	0	0	0
Total	516	456	59	1	0

Q12b: Ethnicity

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Non-Hispanic/Non-Latino	432	391	40	1	0
Hispanic/Latino	81	62	19	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected	3	3	0	0	0
Total	516	456	59	1	0

Q13a1: Physical and Mental Health Conditions at Start

	Total Persons	Without Children	Adults in HH with Children & Adults	Children in HH with Children & Adults	With Children and Adults 🔄	With Only Children	Unknown Household Type
Mental Health Problem	166	162	2	2	--	0	0
Alcohol Abuse	31	31	0	0	--	0	0
Drug Abuse	23	23	0	0	--	0	0
Both Alcohol and Drug Abuse	14	14	0	0	--	0	0
Chronic Health Condition	74	73	1	0	--	0	0
HIV/AIDS	0	0	0	0	--	0	0
Developmental Disability	37	31	1	4	--	1	0
Physical Disability	82	81	1	0	--	0	0

🔄 The "With Children and Adults" column is retired as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

Q13b1: Physical and Mental Health Conditions at Exit

	Total Persons	Without Children	Adults in HH with Children & Adults	Children in HH with Children & Adults	With Children and Adults 🔄	With Only Children	Unknown Household Type
Mental Health Problem	118	115	1	2	--	0	0
Alcohol Abuse	23	23	0	0	--	0	0
Drug Abuse	18	18	0	0	--	0	0
Both Alcohol and Drug Abuse	15	15	0	0	--	0	0
Chronic Health Condition	47	47	0	0	--	0	0
HIV/AIDS	0	0	0	0	--	0	0
Developmental Disability	23	19	1	2	--	1	0
Physical Disability	52	52	0	0	--	0	0

🔄 The "With Children and Adults" column is retired as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".

Q13c1: Physical and Mental Health Conditions for Stayers

	Total Persons	Without Children	Adults in HH with Children & Adults	Children in HH with Children & Adults	With Children and Adults 🔄	With Only Children	Unknown Household Type
Mental Health Problem	38	37	1	0	--	0	0
Alcohol Abuse	6	6	0	0	--	0	0
Drug Abuse	8	8	0	0	--	0	0
Both Alcohol and Drug Abuse	3	3	0	0	--	0	0
Chronic Health Condition	22	21	1	0	--	0	0
HIV/AIDS	0	0	0	0	--	0	0
Developmental Disability	14	12	0	2	--	0	0
Physical Disability	27	26	1	0	--	0	0

🔄 The "With Children and Adults" column is retired as of 10/1/2019 and replaced with the columns "Adults in HH with Children & Adults" and "Children in HH with Children & Adults".


Q14a: Domestic Violence History

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Yes	95	74	21	0	0
No	213	209	4	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected	173	173	0	0	0
Total	481	456	25	0	0

Q14b: Persons Fleeing Domestic Violence

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Yes	36	17	19	0	0
No	55	53	2	0	0
Client Doesn't Know/Client Refused	3	3	0	0	0
Data Not Collected	1	1	0	0	0
Total	95	74	21	0	0

Q15: Living Situation

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Homeless Situations	0	0	0	0	0
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	113	107	6	0	0
Transitional housing for homeless persons (including homeless youth)	1	1	0	0	0
Place not meant for habitation	56	55	1	0	0
Safe Haven	2	2	0	0	0
Host Home (non-crisis)	3	3	0	0	0
Interim Housing 	0	0	0	0	0
Subtotal	175	168	7	0	0
Institutional Settings	0	0	0	0	0
Psychiatric hospital or other psychiatric facility	5	5	0	0	0
Substance abuse treatment facility or detox center	2	2	0	0	0
Hospital or other residential non-psychiatric medical facility	4	4	0	0	0
Jail, prison or juvenile detention facility	2	2	0	0	0
Foster care home or foster care group home	0	0	0	0	0
Long-term care facility or nursing home	0	0	0	0	0
Residential project or halfway house with no homeless criteria	1	1	0	0	0
Subtotal	14	14	0	0	0
Other Locations	0	0	0	0	0
Permanent housing (other than RRH) for formerly homeless persons	1	1	0	0	0
Owned by client, no ongoing housing subsidy	0	0	0	0	0
Owned by client, with ongoing housing subsidy	1	1	0	0	0
Rental by client, with RRH or equivalent subsidy	0	0	0	0	0
Rental by client, with HCV voucher (tenant or project based)	0	0	0	0	0
Rental by client in a public housing unit	3	3	0	0	0
Rental by client, no ongoing housing subsidy	20	12	8	0	0
Rental by client, with VASH subsidy	2	2	0	0	0
Rental by client with GPD TIP subsidy	0	0	0	0	0
Rental by client, with other housing subsidy	2	2	0	0	0
Hotel or motel paid for without emergency shelter voucher	4	3	1	0	0
Staying or living in a friend's room, apartment or house	21	17	4	0	0
Staying or living in a family member's room, apartment or house	24	19	5	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected	214	214	0	0	0
Subtotal	292	274	18	0	0
Total	481	456	25	0	0

 Interim housing is retired as of 10/1/2019.

Q16: Cash Income - Ranges

	Income at Start	Income at Latest Annual Assessment for Stayers	Income at Exit for Leavers
No income	142	6	82
\$1 - \$150	2	1	0
\$151 - \$250	4	0	4
\$251 - \$500	17	0	9
\$501 - \$1000	62	5	47
\$1,001 - \$1,500	26	1	17
\$1,501 - \$2,000	9	0	4
\$2,001+	7	0	3
Client Doesn't Know/Client Refused	0	0	0
Data Not Collected	212	0	223
Number of Adult Stayers Not Yet Required to Have an Annual Assessment	0	75	0
Number of Adult Stayers Without Required Annual Assessment	0	4	0
Total Adults	481	92	389

Q17: Cash Income - Sources

	Income at Start	Income at Latest Annual Assessment for Stayers	Income at Exit for Leavers
Earned Income	36	1	23
Unemployment Insurance	3	0	5
SSI	38	4	24
SSDI	46	0	37
VA Service-Connected Disability Compensation	0	0	0
VA Non-Service Connected Disability Pension	0	0	0
Private Disability Insurance	0	0	0
Worker's Compensation	1	0	0
TANF or Equivalent	6	1	3
General Assistance	1	0	0
Retirement (Social Security)	5	0	2
Pension from Former Job	1	0	1
Child Support	3	1	1
Alimony (Spousal Support)	0	0	0
Other Source	7	0	5
Adults with Income Information at Start and Annual Assessment/Exit	0	12	132

Q19b: Disabling Conditions and Income for Adults at Exit

	AO: Adult with Disabling Condition	AO: Adult without Disabling Condition	AO: Total Adults	AO: % with Disabling Condition by Source	AC: Adult with Disabling Condition	AC: Adult without Disabling Condition	AC: Total Adults	AC: % with Disabling Condition by Source	UK: Adult with Disabling Condition	UK: Adult without Disabling Condition	UK: Total Adults	UK: % with Disabling Condition by Source
Earned Income	8	8	16	50.00 %	0	3	3	0.00 %	0	0	0	--
Supplemental Security Income (SSI)	10	8	18	55.56 %	0	1	1	0.00 %	0	0	0	--
Social Security Disability Insurance (SSDI)	19	9	28	67.86 %	0	1	1	0.00 %	0	0	0	--
VA Service-Connected Disability Compensation	0	0	0	--	0	0	0	--	0	0	0	--
Private Disability Insurance	0	0	0	--	0	0	0	--	0	0	0	--
Worker's Compensation	0	0	0	--	0	0	0	--	0	0	0	--
Temporary Assistance for Needy Families (TANF)	1	0	1	100.00 %	0	2	2	0.00 %	0	0	0	--
Retirement Income from Social Security	1	1	2	50.00 %	0	0	0	--	0	0	0	--
Pension or retirement income from a former job	0	1	1	0.00 %	0	0	0	--	0	0	0	--
Child Support	0	1	1	0.00 %	0	0	0	--	0	0	0	--
Other source	3	3	6	50.00 %	0	3	3	0.00 %	0	0	0	--
No Sources	31	27	58	53.45 %	1	3	4	25.00 %	0	0	0	--
Unduplicated Total Adults	64	57	121		1	9	10		0	0	0	

Q20a: Type of Non-Cash Benefit Sources

	Benefit at Start	Benefit at Latest Annual Assessment for Stayers	Benefit at Exit for Leavers
Supplemental Nutritional Assistance Program	111	5	67
WIC	6	0	4
TANF Child Care Services	1	0	1
TANF Transportation Services	0	0	0
Other TANF-Funded Services	1	0	0
Other Source	5	1	3

Q21: Health Insurance

	At Start	At Annual Assessment for Stayers	At Exit for Leavers
Medicaid	191	10	128
Medicare	54	2	30
State Children's Health Insurance Program	21	2	8
VA Medical Services	1	0	0
Employer Provided Health Insurance	3	0	5
Health Insurance Through COBRA	2	0	1
Private Pay Health Insurance	9	0	4
State Health Insurance for Adults	39	4	15
Indian Health Services Program	2	0	0
Other	7	1	1
No Health Insurance	35	1	15
Client Doesn't Know/Client Refused	6	0	6
Data Not Collected	159	4	166
Number of Stayers Not Yet Required to Have an Annual Assessment	0	86	0
1 Source of Health Insurance	181	14	111
More than 1 Source of Health Insurance	69	2	38

Q22a2: Length of Participation – ESG Projects

	Total	Leavers	Stayers
0 to 7 days	13	8	5
8 to 14 days	13	7	6
15 to 21 days	6	2	4
22 to 30 days	5	2	3
31 to 60 days	20	8	12
61 to 90 days	29	17	12
91 to 180 days	59	42	17
181 to 365 days	90	62	28
366 to 730 days (1-2 Yrs)	95	75	20
731 to 1,095 days (2-3 Yrs)	36	36	0
1,096 to 1,460 days (3-4 Yrs)	35	34	1
1,461 to 1,825 days (4-5 Yrs)	37	35	2
More than 1,825 days (> 5 Yrs)	78	76	2
Data Not Collected	0	0	0
Total	516	404	112

Q22c: Length of Time between Project Start Date and Housing Move-in Date

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
7 days or less	1	0	1	0	0
8 to 14 days	0	0	0	0	0
15 to 21 days	0	0	0	0	0
22 to 30 days	0	0	0	0	0
31 to 60 days	0	0	0	0	0
61 to 180 days	1	1	0	0	0
181 to 365 days	0	0	0	0	0
366 to 730 days (1-2 Yrs)	0	0	0	0	0
Total (persons moved into housing)	2	1	1	0	0
Average length of time to housing	17.00	70.00	0.00	--	--
Persons who were exited without move-in	2	2	0	0	0
Total persons	4	3	1	0	0

Q22d: Length of Participation by Household Type

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
7 days or less	13	13	0	0	0
8 to 14 days	13	9	4	0	0
15 to 21 days	6	6	0	0	0
22 to 30 days	5	5	0	0	0
31 to 60 days	20	15	5	0	0
61 to 90 days	29	28	0	1	0
91 to 180 days	59	39	20	0	0
181 to 365 days	90	73	17	0	0
366 to 730 days (1-2 Yrs)	95	82	13	0	0
731 to 1,095 days (2-3 Yrs)	36	36	0	0	0
1,096 to 1,460 days (3-4 Yrs)	35	35	0	0	0
1,461 to 1,825 days (4-5 Yrs)	37	37	0	0	0
More than 1,825 days (> 5 Yrs)	78	78	0	0	0
Data Not Collected	0	0	0	0	0
Total	516	456	59	1	0

Q22e: Length of Time Prior to Housing - based on 3.917 Date Homelessness Started

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
7 days or less	14	14	0	0	0
8 to 14 days	2	2	0	0	0
15 to 21 days	2	2	0	0	0
22 to 30 days	1	1	0	0	0
31 to 60 days	4	4	0	0	0
61 to 180 days	13	11	2	0	0
181 to 365 days	17	12	5	0	0
366 to 730 days (1-2 Yrs)	11	8	3	0	0
731 days or more	37	35	2	0	0
Total (persons moved into housing)	101	89	12	0	0
Not yet moved into housing	3	1	2	0	0
Data not collected	46	17	29	0	0
Total persons	150	107	43	0	0

Q23c: Exit Destination – All persons

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
<b>Permanent Destinations</b>	0	0	0	0	0
Moved from one HOPWA funded project to HOPWA PH	0	0	0	0	0
Owned by client, no ongoing housing subsidy	1	1	0	0	0
Owned by client, with ongoing housing subsidy	1	1	0	0	0
Rental by client, no ongoing housing subsidy	21	9	12	0	0
Rental by client, with VASH housing subsidy	0	0	0	0	0
Rental by client, with GPD TIP housing subsidy	0	0	0	0	0
Rental by client, with other ongoing housing subsidy	23	12	10	1	0
Permanent housing (other than RRH) for formerly homeless persons	0	0	0	0	0
Staying or living with family, permanent tenure	6	6	0	0	0
Staying or living with friends, permanent tenure	2	2	0	0	0
Rental by client, with RRH or equivalent subsidy	0	0	0	0	0
Rental by client, with HCV voucher (tenant or project based)	0	0	0	0	0
Rental by client in a public housing unit	1	1	0	0	0
<b>Subtotal</b>	55	32	22	1	0
<b>Temporary Destinations</b>	0	0	0	0	0
Emergency shelter, including hotel or motel paid for with emergency shelter voucher	6	6	0	0	0
Moved from one HOPWA funded project to HOPWA TH	0	0	0	0	0
Transitional housing for homeless persons (including homeless youth)	2	2	0	0	0
Staying or living with family, temporary tenure (e.g. room, apartment or house)	6	5	1	0	0
Staying or living with friends, temporary tenure (e.g. room, apartment or house)	6	6	0	0	0
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	27	27	0	0	0
Safe Haven	0	0	0	0	0
Hotel or motel paid for without emergency shelter voucher	0	0	0	0	0
Host Home (non-crisis)	0	0	0	0	0
<b>Subtotal</b>	47	46	1	0	0
<b>Institutional Settings</b>	0	0	0	0	0
Foster care home or group foster care home	0	0	0	0	0
Psychiatric hospital or other psychiatric facility	1	0	1	0	0
Substance abuse treatment facility or detox center	1	1	0	0	0
Hospital or other residential non-psychiatric medical facility	3	3	0	0	0
Jail, prison, or juvenile detention facility	0	0	0	0	0
Long-term care facility or nursing home	0	0	0	0	0
<b>Subtotal</b>	5	4	1	0	0
<b>Other Destinations</b>	0	0	0	0	0
Residential project or halfway house with no homeless criteria	0	0	0	0	0
Deceased	3	3	0	0	0
Other	5	5	0	0	0
Client Doesn't Know/Client Refused	1	1	0	0	0
Data Not Collected (no exit interview completed)	288	288	0	0	0
<b>Subtotal</b>	297	297	0	0	0
Total	404	379	24	1	0
Total persons exiting to positive housing destinations	31	17	14	0	0
Total persons whose destinations excluded them from the calculation	4	4	0	0	0
Percentage	7.75 %	4.53 %	58.33 %	0.00 %	--

Q24: Homelessness Prevention Housing Assessment at Exit

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Able to maintain the housing they had at project start--Without a subsidy	5	0	5	0	0
Able to maintain the housing they had at project start--With the subsidy they had at project start	5	4	0	1	0
Able to maintain the housing they had at project start--With an on-going subsidy acquired since project start	0	0	0	0	0
Able to maintain the housing they had at project start--Only with financial assistance other than a subsidy	0	0	0	0	0
Moved to new housing unit--With on-going subsidy	1	1	0	0	0
Moved to new housing unit--Without an on-going subsidy	0	0	0	0	0
Moved in with family/friends on a temporary basis	1	1	0	0	0
Moved in with family/friends on a permanent basis	1	1	0	0	0
Moved to a transitional or temporary housing facility or program	0	0	0	0	0
Client became homeless – moving to a shelter or other place unfit for human habitation	0	0	0	0	0
Client went to jail/prison	0	0	0	0	0
Client died	0	0	0	0	0
Client doesn't know/Client refused	0	0	0	0	0
Data not collected (no exit interview completed)	0	0	0	0	0
Total	16	7	8	1	0

Q25a: Number of Veterans

	Total	Without Children	With Children and Adults	Unknown Household Type
Chronically Homeless Veteran	3	3	0	0
Non-Chronically Homeless Veteran	19	19	0	0
Not a Veteran	455	430	25	0
Client Doesn't Know/Client Refused	1	1	0	0
Data Not Collected	3	3	0	0
Total	481	456	25	0

Q26b: Number of Chronically Homeless Persons by Household

	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Chronically Homeless	66	66	0	0	0
Not Chronically Homeless	225	165	59	1	0
Client Doesn't Know/Client Refused	3	3	0	0	0
Data Not Collected	222	222	0	0	0
Total	516	456	59	1	0