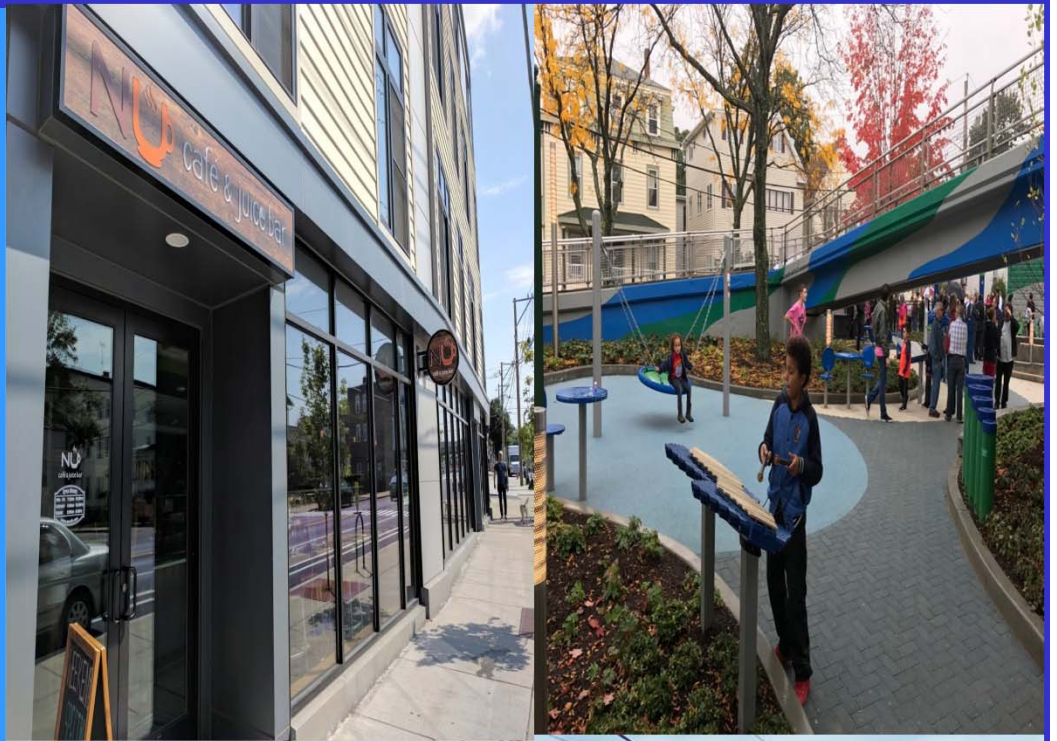


C A P E R



JULY 1, 2016 –
JUNE 30, 2017



Somerville
Massachusetts

Consolidated Annual Performance and Evaluation Report

City of Somerville
MAYOR JOSEPH A. CURTATONE

MAYOR'S OFFICE OF STRATEGIC PLANNING
AND COMMUNITY DEVELOPMENT
Michael F. Glavin, Executive Director

CR-05 - Goals and Outcomes

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

This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

The Consolidated Plan is designed to help local jurisdictions assess their affordable housing and community development needs and market conditions, and to make data-driven, place-based investment decisions. The consolidated planning process serves as the framework for a community-wide dialogue to identify housing and community development priorities that align and focus funding from three federal Community Planning and Development (CPD) formula block grant programs: The Community Development Block Grant (CDBG), the HOME Investment Partnership (HOME) and Emergency Solution Grant (ESG) program. In the Consolidated Annual Performance and Evaluation Report (CAPER), grantees report on accomplishments and progress toward Consolidated Plan goals in the prior year.

This is the fourth reporting year of the 2013-2017 Consolidated Plan. The City of Somerville administered approximately \$ 4,631,462 in CPD funds:

- CDBG \$3,665,215
 - HOME \$ 772,180
 - ESG \$ 194,068
- The following overarching goals adopted in the 2013-2017 Consolidated Plan guided the City in assigning the annual community priorities:
- Family stabilization and job readiness;
 - Preserve and maintain existing affordable housing;
 - Reduce and end homelessness; and
 - Stabilize and revitalize diverse neighborhoods. The table below represents by unit of measure (e.g. housing units, persons assisted, number of beds, etc.) and update of the Consolidated Plan's five year expected strategic goals and actual program year outcomes.

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)

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee’s program year goals.

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Family Stabilization and Job Readiness	Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	2200	8982	408.27%	1000	4010	401.00%
Family Stabilization and Job Readiness	Non-Housing Community Development	CDBG: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	79				
Family Stabilization and Job Readiness	Non-Housing Community Development	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	550	848	154.18%	550	848	154.18%
Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Rental units constructed	Household Housing Unit	30	35	116.67%	60	35	58.33%

Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Rental units rehabilitated	Household Housing Unit	25	1	4.00%	0	1	
Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Added	Household Housing Unit	0	0		10	0	0.00%
Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	120	22	18.33%	15	5	33.33%
Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	200	41	20.50%	20	11	55.00%
Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Housing for Homeless added	Household Housing Unit	0	2		0	2	
Preserve and Maintain Existing Affordable Housing	Affordable Housing	CDBG: \$ / HOME: \$	Housing for People with HIV/AIDS added	Household Housing Unit	0	0		0	0	

Reducing and Ending Homelessness	Homeless	ESG: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	100	1020	1,020.00%			
Reducing and Ending Homelessness	Homeless	ESG: \$	Homeless Person Overnight Shelter	Persons Assisted	550	848	154.18%	550	848	154.18%
Reducing and Ending Homelessness	Homeless	ESG: \$	Homelessness Prevention	Persons Assisted		154		100	154	154.00%
Stabilize and Revitalize Diverse Neighborhoods	Affordable Housing Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1750	13163	752.17%	1000	3215	321.50%
Stabilize and Revitalize Diverse Neighborhoods	Affordable Housing Non-Housing Community Development	CDBG: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0			0	
Stabilize and Revitalize Diverse Neighborhoods	Affordable Housing Non-Housing Community Development	CDBG: \$	Facade treatment/business building rehabilitation	Business	25	7	28.00%			

Stabilize and Revitalize Diverse Neighborhoods	Affordable Housing Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	145	162	111.72%	35	22	62.86%
--	--	----------	---------------------	---------------------	-----	-----	---------	----	----	--------

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 the fourth program year of the 2013-2017 Consolidated Plan the City continued to achieve results in meeting the goals and objectives set forth in the five year plan.

Economic Development -Commercial Property Improvement - The city was able to continue a steady pace of activity in the commercial property improvement program. In PY16, the city was able to complete 6 storefront projects in addition 3 projects are entering construction and 16 other projects are either in the design or application phase. In total, these projects would assist an additional 25 small business in the city's key commercial districts. *Small Business Technical Assistance* - In PY16, the city continued to partner with the two Main Street organizations serving the key commercial districts of Lower Broadway and Union Square. These two organizations serve as critical resources for providing technical assistance to many of the small business micro enterprises in the area. In PY16, East Somerville Main Streets and Union Square Main Streets continued to work closely with neighborhood businesses to provide technical assistance on issues ranging from operational guidance, small business startup, marketing and customer retention, planning for ongoing and upcoming infrastructure changes, and managing the economic revitalization occurring in these neighborhoods due to the green line extension and Assembly Square development. Many of the local area businesses who benefit from these services are also owned by low income, minority, and immigrant households. In total, the two Main Streets programs were able to assist 17 microenterprises in PY16.

Parks and Open Space- The city remained committed to its goal of creating suitable living environments for its low to moderate income residents by creating additional new accessible open space in low to moderate income neighborhoods. In PY16, the city completed renovations at Otis park creating 7,500 sq. feet of new usable play area in this formerly dilapidated adjacent to the highly congested area near McGrath O’Brien highway. *Urban Forestry* - In PY16, the city continued to expand its street tree planting program planting 70 trees citywide in various

low to moderate income census tracts. The city is currently planning for another planting cycle with future years funding. The street tree planting program yields a number of benefits in providing a suitable living environment including storm water management, shade, and noise and air pollution benefits.

Public Services – The majority of the public services carried out in the City of Somerville address the City’s goal of providing family stabilization and job readiness programs. In program year 2016 over 4,000 income eligible persons were assisted by these programs. These programs cover a range of services including supervised affordable childcare and after-school help for low income children of working families; leadership programming for future youth and adult community leaders; education and training to improve employment and housing opportunities; housing case management; health and wellness inclusionary programs to foster independence.

Affordable Housing Narrative

Preserve and Maintain Affordable Housing - In light of a continuing strong real estate market, the city has continued to make efforts to ease the burden of historically high housing costs on its low to moderate income residents. The city has continued to expand its 100 homes programs by acquiring additional properties including 72 Marshall St. which will be rehabilitated for affordable units. The city also continues to jointly market its residential rehab program along with its lead abatement and energy efficiency programs. These marketing efforts have resulted in higher participation rates for the program. In program year 2016 the city completed 5 units and has an additional 10 units in either the construction or project bid phases. The city has also made progress in bringing larger longer term projects to completion including commencement of construction on the adaptive re-use project at the former MWRA pumping station site and securing final financing for 163 Glen St. Looking forward to future program years the city plans to begin rehab work on several of the 100 homes properties acquired as well as explore opportunities to utilize HUD funding sources towards the reconstruction and revitalization of the Clarendon Hill public housing site.

Emergency Solutions Narrative

Emergency Solution Grant and Public Services - Strategies have been developed toward reducing and ending homelessness through collaboration and efforts to gather and analyze information to determine local needs of people experiencing homelessness, identifying and bridging gaps in housing and services, implementing strategic responses, educating the community on homeless issues, providing advice and input on the operations of homeless services and measuring program performance. For example, Public Service funding assisted 10 chronically homeless households with supportive therapy, life skill development/enhancement and recovery and relapse prevention in their home to support participants in taking steps toward successful tenancy and self-sufficiency; 154 individuals at-risk of homelessness were provided

housing stability counseling to prevent recidivism; domestic violence hot-line staff provided safety net planning to over 350 persons experiencing violence including information and referrals for emergency shelter and other support services to enable domestic violence victims to rebuild their lives. Through ESG funding Outreach programs identified and screen potential participants; Shelter guests were provided supportive services, case management and housing search toward permanent housing (777 adults and 71 children); Homeless Prevention strategies and counseling were used to help residents remain housed, negotiate with their landlords and/or find less expensive housing (33 adults and 27 children were assisted). Using the Housing First/Rapid Rehousing model, homeless residents were housed in affordable units (8 adults and 8 children were assisted). Transition into independent living for clients who received Prevention and Rapid Rehousing assistance has been successful. All clients who have received funds through these programs continue to be stable in their units.

DRAFT

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	2,335	32	586
Black or African American	819	0	282
Asian	102	0	10
American Indian or American Native	19	0	5
Native Hawaiian or Other Pacific Islander	1	0	4
Total	3,276	32	887
Hispanic	434	4	161
Not Hispanic	2,842	28	726

Table 2 – Table of assistance to racial and ethnic populations by source of funds

Narrative

The City of Somerville identifies priority needs and offers services and programs to eligible individuals and households regardless of race or ethnicity. The table on this page depicts counts for Fiscal Year 2016 by funding source. Entitlement funds were distributed among Somerville residents from extremely low income, low income and moderate income persons and households and high concentrations of minorities.

Most CDBG Public Service sub-recipients collect income and ethnicity information on their clients. However, the City utilized presumed benefit from some public service programs that serve elderly and disabled adults and are located in qualified census tracts. In those special circumstances, the City, prior to funding, considers who the targeted beneficiaries are intended to be, the nature of the program and its location. This evaluation must result in a determination that at least 51% of the intended beneficiaries will be low and moderate income persons. Of the total persons served with CDBG Public Service funds, 30% reported themselves as low income and 64.6% as very low income. All the ESG clients served were very low income.

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	CDBG	2,264,442	3,665,215
HOME	HOME	399,540	772,180
HOPWA	HOPWA		
ESG	ESG	203,461	194,068
Continuum of Care	Continuum of Care	1,771,441	
Housing Trust Fund	Housing Trust Fund	400,000	
Other	Other	880,416	

Table 3 - Resources Made Available

Narrative

The City of Somerville receives federal grants from the Department of Housing and Urban Development (HUD) for three formula grant programs each year: The Community Development Block Grant (CDBG) program, the HOME Investment Partnership Act (HOME) program, and the Emergency Solutions Grant (HESG) program. For the program beginning July 1, 2016 – June 30, 2017, Somerville received \$2,264,442 in CDBG funds, \$399,540 in HOME funds and \$203,461 in HESG funds. During the same time period the City of Somerville expended \$3,665,214 in CDBG funds, \$772,180 in HOME funds and \$194,068 in HESG funds. In addition to these three primary CPD program fund sources, the City also receives funds from other federal and local sources including \$669,234 from the final year of the 2013 Lead Abatement grant, \$869,625 from the Affordable Housing Trust, and \$880,416 in local Community Preservation Act funds. The amounts shown do not include reprogrammed prior year funds and funds awarded to activities in prior years that were not spent until the 2016-2017 program year. Delays in expending prior year's funds on larger construction projects may have resulted for numerous reasons including weather related and construction cycle delays,

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Central Broadway	25	41	
City Wide	25	39	Target areas outside of the NRSA's
EAST SOMERVILLE NRSA	25	5	
UNION SQUARE NRSA	25	15	

Table 4 – Identify the geographic distribution and location of investments

Narrative

In program year 2016 the city continued to focus its programming in the East Somerville, Central Broadway, and Union Square districts. Significant progress was made in the stabilization and revitalization goals for these neighborhoods. A number of initiatives were either initiated or are currently in construction or scheduled to enter construction during the 2017 program year including open space, economic development, and affordable housing projects.

Parks and Open Space - A number of notable projects were undertaken in PY16 to improve access to quality recreational and open space for local residents including the completion of Otis Park, the commencement of construction on Hoyt-Sullivan playground and preliminary design work for the Winter Hill playground. All of these projects will reintroduce quality recreational and open space to some of the most densely populated residential neighborhoods in the city.

Economic Development - The city remained focused on supporting its local small businesses through the continuation of the commercial property improvement program and the small business technical assistance programs. The storefront improvement program continued its outreach in the East Somerville and Central Broadway corridors and also expanded its program marketing efforts in the Union Square district. 4 of the 5 completed projects were in these neighborhoods. Aside from these completed projects, there are another 5 currently in the construction phase, 3 projects that have completed the application phase and an additional 17 applicants that have expressed interest. Along with the CPIP, the city has also maintained its commitment to assisting local independent micro-enterprises through the Main Streets programs in East Somerville and Union Sq. which provide critical technical assistance and support services to businesses operating in these emerging commercial districts.

Affordable Housing - The city has made significant progress in its efforts to create and preserve affordable housing. In PY 16 the City was able to make several key investments and funding commitments towards development projects in Union Square and East Somerville. In Union Square, 181 Washington St opened its doors in the fall of 2016. This brought 35 affordable units online in the USQ area. In East Somerville, the city will commence construction on 4 affordable homeownership units. Lastly, construction commenced on the MWRA pump station which will be converted to 25 units of affordable purpose built rental housing in the western portion of the city.

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.

City activities funded with CDBG, HOME and ESG also receive financial assistance from other sources including other federal and state programs. The tables below show the breakdown of funds leveraged. ESG sub-recipients are required to demonstrate a match for ESG funds. See ESG match attached below. The match this year totaled \$908,585. Public Service CDBG sub-recipients are encouraged to demonstrate a match, as well, and the amount totaled \$1,496,559. See match for Public Services attached below. In addition to the match tables displayed for public service agencies the City of Somerville aims to utilize matching requirements across all of its federal programs when possible. For example, Somerville was able to leverage a state funded PARC grant \$400K as well as \$400K in CPA funds for the Hoyt-Sullivan playground project. The city also requires a dollar for dollar private match from business or property owners on any storefront project above \$7,500. On affordable housing projects the city's Affordable Housing Trust fund receives an annual allocation from receipts collected on the city's Community Preservation Act surcharge fee and matching state funds. This total just over \$880,416 in program year PY16. Larger development projects also receive other sources of funding such as low income tax credits, and other state, local, and private financing.

FY2016 Public Service Leverage				
Agency	Award PY16	Description	Match	Match amt
Boys & Girls Club, 5 Meacham St, Somerville 02145	\$8,800.00	Project Learn	United Way	8,800
Camb Health Alliance, 82 Highland Ave, Somerville 02143	\$4,000.00	Health Advisory & Middle School Prog	MA Dep Pub Hlth	75,525
Center for Teen Empowerment, 165 Broadway, Somerville 02143	\$60,000.00	Youth Organizing Initiative	104,850 Shannon Grant, CHNA Youth at Risk Grant, Tufts health, 5K United Way	109,850
Groundwork Somerville, 24 Park St #7, Somerville 02143	\$6,000.00	Green Team	5,360 Nat. Park Serv, (34K Forest found, Bushrod Campbell Fund, Merck Fam Fund), 33,550 Metro No Reg Employ Brd, 26K Com Preservation Act	98,910
MAPS MA Alliance Port. Speakers, 1046 Cambridge St, Cambridge 02139	\$5,000.00	Immigrant Integration Services	United Way	5,000
Mystic Learning Services, 530 Mystic Ave, Somerville 02145	\$17,000.00	Empowering Competent Youth	30.9 various foundation, 28.5 Housing Auth, 177.6K D of Early Ed & Care	237,000
Respond Inc, P O Box 555, Somerville 02143	\$16,500.00	24 Hr Crisis Hotline	Dep of children and Families (DCF) & Contributions	18,862
Riverside Com Care/Guidance Center, 32 Tyler St, Somerville 02143	\$5,000.00	Early Intervention	City of Camb, Camb Com Foundation	5,000
SCM Com Corp, 167 Holland St, Somerville 02144	\$60,000.00	Elderly & Disabled Transportation	Cambridge, Medford and Malden	303,300
Som Community Corp, 81 Highland Ave, Somerville 02143	\$8,800.00	Som Peacemaker Project	Som Public Schools	170,000
Som Homeless, 1 Davis Square, Somerville 02144	\$6,300.00	Better Homes Support Program	HUD	115,900
Som Homeless Soup, 1 Davis Square, Somerville 02144	\$72,766.00	Food Pantry & Meal Program	41K Project Bread, EFSP, Tufts Neighborhood Grant, 59K fundraising/donations	100,725
Som Homeless, 1 Davis Square, Somerville 02144	\$8,000.00	Volunteer Prog & Resource Center	foundations, faith based organizations & fundraising	17,795

Som Homeless , 1 Davis Square, Somerville 02144	\$100,000.00	Passages Housing Stabilization		
Somerville YMCA CIT/LIT, 101 Highland Ave, Somerville 02143	\$22,000.00	Counsel in Training/LIT	in-kind office & equipment for prog activities	28,000
Welcome Project, 530 Mystic Ave, Somerville 02145	\$8,300.00	Stepping Up to Somerville Promise	53K Foundations/Trusts, 12K Som Housing Auth	65,000
xSom Arts Council, 50 Evergreen Ave, Somerville 02145	\$8,300.00	Art Without Walls	3K Shousing Auth, 2.5K Eastern Bank Found, 9K fees, 2,160 City, 6.9K revolving	23,560
xSom Council on Aging, 167 Holland Ave, Somerville 02144	\$14,000.00	Health & Wellness Initiative	4,432 City budget, 11K Title III D & B	15,432
xSom Health Dept, 50 Evergreen Ave, Somerville 02145	\$8,300.00	Som Cares about Prevention	MA Dep Pub Hlth Bur of Substance Abuse	97,900
Caper 16 PS Match	\$440,166.00			1,496,559

DRAFT

2016-17 ESG Agency Match Contribution			
Agency	Award 2016-17	Match Amount	Source
CASPAR Inc 240 Albany St, Camb 02139	\$21,000.00	\$200,000.00	MA Dept of Public Health, MA Housing & Shelter Alliance (100K) & in-kind (100K)
Catholic Charities, 270 Washington St, Som 02143	\$12,626.00	\$18,500.00	7K DHCD, 2K Citizen's Energy, 3.5K Greater Boston Food Bank, 3.5K Camb Com Foundation, 2.5K Catholic Charitable Bureau, OHCD
Respond, Inc P O Box 555, Somerville 02143 (confidential shelter)	\$25,900.00 \$5,000.00	\$42,020.00	24,220 Dept of Children and Families, 17,800 contributions and private foundations
Som Homeless Coalition family shlt: 50 Cross St, Somerville 02145 adult shlt: 14 Chapel St, Somerville 02144	\$61,760.00 \$40,897.00 \$15,110.00 \$6,750.00	\$513,000.00 \$11,000.00 \$109,647.00	Dept of Housing Com Dev Emerg Food & Shlt Prog Donations
Administration SPCD, 93 Highland Ave, Som 02143	\$14,418.00	\$14,418.00	City Appropriations

Fiscal Year Summary – HOME Match (TBD)	
1. Excess match from prior Federal fiscal year	0
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	0
4. Match liability for current Federal fiscal year	0
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	0

Table 5 – Fiscal Year Summary - HOME Match Report

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match

Table 6 – Match Contribution for the Federal Fiscal Year

HOME MBE/WBE report

Program Income – Enter the program amounts for the reporting period				
Balance on hand at beginning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
0	0	0	0	0

Table 7 – Program Income

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

Table 8 - Minority Business and Women Business Enterprises

Minority Owners of Rental Property – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

Table 9 – Minority Owners of Rental Property

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

Table 10 – Relocation and Real Property Acquisition

DRAFT

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 (TBD)
Number of Homeless households to be provided affordable housing units	15	0
Number of Non-Homeless households to be provided affordable housing units	96	0
Number of Special-Needs households to be provided affordable housing units	2	0
Total	113	0

Table 11 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	15	0
Number of households supported through The Production of New Units	74	35
Number of households supported through Rehab of Existing Units	20	5
Number of households supported through Acquisition of Existing Units	4	3
Total	113	43

Table 12 – Number of Households Supported

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

Program year 2016 marked a banner year in terms of achieving many of the affordable housing goals set in the five year plan. The highly anticipated 181 Washington St. project was completed bringing 35 new affordable units online. In addition, construction commenced on another long term project the MWRA pump station conversion which should be completed in program year 2017 and bring an additional 25 units of purpose built affordable housing online. The city continued to make progress on its 100 homes program with the acquisition of 72 Marshall St., a 5 unit property, and expects to complete rehab work

on the first two properties acquired through the 100 homes program 293 Alewife Brook Parkway and 52 Sydney St. Lastly, the city remains committed to supporting low and moderate income households through the continued funding of the PASS tenant based rental assistance program. All of these accomplishments have made tremendous in roads to achieving the cities goals outlined in its 5 year plan. While the city is enthusiastic about its recent successes with this program it also acknowledges that future success of the program could be muted if real estate values in the Metro Boston area continue to rise at the current rate.

Discuss how these outcomes will impact future annual action plans.

The city remains committed to taking a multi-faceted creative approach to addressing the dual challenge of increased housing demand and rising property values in Somerville. The city has been diligently exploring every avenue and resource available. The city continues to evaluate the recommendations proposed by the 29 member Sustainable Neighborhoods Committee formed in PY15. In addition to implementing any recommendations that may result from this panel the city continues to search for creative funding sources and solutions to supplement its traditional housing programs. In other ongoing sources of support, the Somerville Affordable Housing Trust Fund was awarded \$880K in its second annual allocation of Community preservation act funds which is dedicated to creating affordable Housing opportunities within the city, including support of the 100 Homes initiative. In addition to these funding opportunities the city continues to support affordable housing production both through subsidized development and private development through the City’s Inclusionary Zoning Ordinance. The city remains both hopeful and confident that this multi-faceted approach will result in much needed relief in the area of affordable housing.

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

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	79	0
Low-income	13	0
Moderate-income	1	0
Total	93	0

Table 13 – Number of Households Served

Narrative Information

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

The City of Somerville and the Continuum of Care in partnership with the Somerville Police Department have performed outreach to and engage the homeless population. Any resident who needs shelter, or who knows a person who is homeless and needs assistance can call 311 to be connected with homeless services. Connection and engagement with the homeless person builds trust and the unsheltered person may be ready to accept assistance and linkage to other services. The Youth Harbors team has been instrumental in reaching out to young adults experiencing homelessness in the community. They have worked in the high school and community and continue to work throughout the summer to identify and make contact with students, process referrals and field questions. Staff have addressed the unique challenges these high school students face and have helped them find some peace and stability in their lives while trying to locate and hold onto hope for the future and keep pushing forward.

Addressing the emergency shelter and transitional housing needs of homeless persons

The City of Somerville is committed to working with housing and service providers to provide housing related resources to assist homeless individuals and families attain the first step toward self-sufficiency and stable housing.

MOSPCD continued to be an active member in the Somerville-Arlington Continuum of Care(CoC) – a community collaboration with representatives from local cities and towns, homeless providers and other establish funding priorities and pursue an overall systemic approach to addressing homelessness in the area. Participation in this group ensures that the City's efforts to address homelessness using ESG funds and other resources are aligned with the area's priorities and respond to the most critical needs with input from the public and other homeless advocates. The implementation of the coordinated entry and housing assessment tool will further the goals of implementing an area approach to solving homelessness.

See the table listing the listing the ESG and Continuum of Care funding awards for FY 2016

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

A variety of efforts were undertaken by the City and the CoC agencies to prevent homelessness. Emergency shelter and transitional housing programs have provided individuals and families who are homeless with short term housing coupled with services to recover their health and move into permanent supportive housing when it becomes available. Set aside rooms for elder homeless individuals have assured them a temporary housing situation until they can move to more permanent housing. Many homeless individuals with psychiatric disabilities have received temporary housing and connection to resources to address a wide range of physical and mental health challenges. Once an appropriate permanent housing solution is identified, the individuals are transition out of temporary housing.

A combination of mainstream preventive services offered by different provider organizations have been adopted including emergency fuel assistance and food and meals programs, as well as, emergency rental assistance, financial assistance, utility assistance, housing relocation and stabilization services, counseling/advocacy and legal assistance. Each service was sought to help families in their home by offering services and support during times of financial and legal difficulty. ESG funds were used to provide short and medium term rental assistance to those at-risk of becoming homeless as well as literally homeless. Clients were offered follow-up case management services consisting of but not limited to, creating and maintaining an accurate budget, assistance increasing income (e.g. applying for public benefits), connecting to community resources (e.g. food pantries and clothing programs), and other referrals driven by the needs and goals of the clients. For the clients receiving funds for arrearages, case management was geared toward budgeting, increasing income, payment plans (if funding amount did not cover the full arrearage amount) and other factors surrounding rental payments to prevent future housing instability. Prevention assistance was in very high demand. The households who received funds through this program continue to be stable in their units. Transition into independent living for the clients who received prevention assistance has been successful.

Information regarding CDBG Public Service funds addressing this issue can be found in the additional section.

CDBG Public Service information

CDBG Public Service funds have helped community providers and residents access services, information, prevention and referral through the 24 Hour Information and Referral Hotline by providing accurate contact information on mainstream services and how to access them; Domestic Violence staff have

provided safety net planning and resources for DV victims, as well as assistance, in court proceedings; Immigrant Social Services have been provided by bilingual counselors for non-English speakers seeking services to assess their housing, health and education needs; Aftercare Mentors have assisted and supported newly independent young mothers and their families transition from shelter to independent living; Better Homes has provided crisis intervention to enable disabled households understand and access the resources necessary to foster housing independency and self-sufficiency. Public Service funding for ESOL Classes and workshops focused on understanding housing policies has helped individuals and families obtain and retain housing and avoid becoming homeless. Public Service funding has provided aftercare and follow-up services for low-income residents transitioning from system care. Local service providers have provided education, employment and financial literacy by managing programs providing employment training and educational programs to promote financial stability and self-sufficiency.

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

The City has utilized \$194,068 in ESG funds to address the urgent needs of the homeless and near homeless. The need for emergency and transitional housing is met using short-term shelters, scattered-site transitional housing units and dormitory-style transitional housing and Rental Assistance. Programs offer access to a broad range of other services including case management, employment assistance, life skills, health care, child care and transportation.

The incorporation of the Housing First Model seeks to improve and simplify local housing and service system making them easy to navigate, while targeting resources quickly and efficiently to the chronically homeless. An immediate connection to permanent supportive housing can ensure that the majority of homeless individuals remain housed, even among clients with severe substance abuse and mental health conditions. However, there is a lack of subsidized and affordable rental units in the area. Very few clients are able to afford to lease in market rent units. However, social service agencies have forged meaningful collaborations with local landlords to identify innovative strategies for housing the chronically homeless. Additionally, awarded providers must work closely with mainstream service providers (such as Social Service Administration, US Dept. of Veterans' Affairs, etc.) to enable clients to qualify for and increase their support system and improve their chances to overcome homelessness.

The Volunteers of America recently completed the construction of 22 transitional and 7 permanent units of housing to serve homeless veterans and to provide affordable housing which will include a full array of wrap around services for residents. Along with housing, the veterans will have access to mental health counseling, employment and healthcare referrals, life skills training, homeless services and

recovery services to help them as they transition back into the community.

Multiple agencies, private and public, offer homeless prevention services to include rental assistance, fair housing services, utility assistance and budgeting skills. Other private and public agencies offer counseling and advocacy services to assist individuals and families who are homeless or at risk of homelessness. For example, Passages Case Management works with clients to enhance economic stability, family safety & stability, health care and civil rights. In addition, a Public Services funded 24 Hour Information & Referral Service Center connects at-risk residents with accurate, up to date social service contact information to enable them to advocate for themselves. Funding for these services come from a combination of Federal, State, local and private sources.

DRAFT

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

Actions taken to address the needs of public housing

The Somerville Housing Authority's 5 Year Plan, released in 2014, states the following strategy they will employ to address Housing Needs.

“The SHA will continue to review waitlist data and priorities to assure, to the maximum extent possible, the housing of eligible area applicants. SHA will continue to process emergency applications in conformance with approved policies. SHA will continue to participate in City of Somerville and area agency forums designed to inform area residents of affordable housing opportunities. SHA has recently completed a waitlist update to remove outdated applicants and allow focus on remaining applicants.”

Waiting lists for all forms of public housing are very long. In addition, the Somerville Housing Authority is part of the Centralized Section 8 Waiting List. The list contains 1495 Somerville applicants and annual turnover is around 50 vouchers per year, meaning it would take close to 30 years to get through the list. There are currently no new Section 8 vouchers available.

Based on this data, the need for affordable rental housing in Somerville is overwhelming.

The City of Somerville will continue to rely on the Somerville Housing Authority to be the major provider of subsidized housing through public housing and vouchers. Most of the households on the SHA waiting lists cannot afford a rental unit on the private market and are therefore waiting for a subsidized unit to solve their housing needs. To that end, the priority of the City of Somerville to increase the number of subsidized affordable units, particularly rental units, is a main focus of this plan. To that end, the City is working closely with the Somerville Housing Authority on and its selected developer to implement the reconstruction of Clarendon Hill, a 216 unit state assisted public housing development. Under its proposal, all 216 units would be replaced and additional middle income workforce housing and market rate units would also be included in the project. The city will also be supporting the project through local funds and will explore the opportunity to use its HUD funding sources as part of its financing package.

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

With respect to management, each SHA building has a tenant association that assists in planning for the development's unique needs. SHA's Resident Services team has hosted many events to establish and maintain strong functioning associations. SHA also provides a share of operating funds and 25% of funds raised from laundry machine use to the tenant associations for their use as they see fit.

The City's Inclusionary Housing Program creates affordable rental and homeownership units via a minimum 12.5% requirement for properties building more than 6 units of new housing (and in larger projects above 8 and 17 units respectively, 17.5 and 20%). The Housing Division will continue to actively

market these units via the SHA to encourage eligible residents to apply.

The City is actively encouraging increased homeownership among public housing residents as well. Given the high cost of ownership housing in Somerville (Median sales price for a single family home in Somerville in 2012 was \$412,500, and for a condominium \$383,000 according to Warren group data), most public housing residents can only afford ownership units through the City's Inclusionary

Housing Program. The SHA also offers a Homeownership Program that allows families with Section 8 vouchers to use their vouchers to help pay the mortgage on a home they buy and the SHA subsidizes the mortgage for 15 years after the purchase. Families who participate in their Family Self-sufficiency (FSS) program (which helps to prepare residents for owning their own home) have the first priority for homeownership slots. For state public housing, SHA was recently approved for a grant that is similar to their FSS Program called MASS LEAP where an account is created for tenants and funds are deposited when there are increases in rent based on increased earned income.

In addition, the Somerville Community Corporation, Somerville's CHDO, offers First-Time Homebuyer Education classes and Financial Literacy classes to help Somerville residents start saving for their goals. In addition, the City will continue to offer First-Time Homebuyer Assistance to income-eligible homebuyers purchasing property in Somerville, making homeownership more accessible.

Actions taken to provide assistance to troubled PHAs

Fortunately, the SHA is not on HUD's list of troubled public housing authorities and is a solid partner in strategizing to provide the community with quality safe and affordable housing.

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)

Specific actions were taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing include providing adequate land for a variety of housing types through review by Zoning and land use updates, working to eliminate obsolete and prescriptive building code requirement, continuing to educate the public on the need for affordable housing and promoting a diversity of affordable housing programs , continuing to streamline the permitting and coordinating with local, state and federal agencies in implementing programs that support affordable housing. The City is supportive of the development of affordable housing and staff is available to meet with affordable housing developers to discuss options to expand affordable housing opportunities and strategies for extremely low, very low, low and moderate income households, and provide additional supportive services and homeless assistance throughout the community.

In addition the City convenes meetings of interested citizens, community organizers, low-income neighborhood residents and others including affordable housing advocates, social service agencies, homelessness housing advocates to allow citizens an opportunity to present their views on community needs. Information is disseminated using various print media outlets. The enforcement of both linkage fees and the Inclusionary Housing Ordinance help off-set the cost of affordable housing for low income workers and mitigate some of the need for increased affordable housing due to employment growth. Affordable housing developers are offered assistance to include financial incentives in the form of low interest loans, technical assistance to secure tax credits and pre-development assistance during the pre-construction phase.

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

The City continues to educate the public on the need for affordable housing and promotes a variety of affordable housing programs. The City holds public meetings to inform citizens of housing programs. The City takes actions to eliminate identified gaps and to strengthen and coordinated the delivery system such as streamlining the permitting process, coordination social services with housing treatment areas and participating on committees involved in housing and social service delivery.

In addition to City operated and sub-recipient programs and activities, many local non-profits agencies help address obstacles in meeting underserved needs. These local non-profits also address the priorities in the Consolidated Plan and receive funding through public sources, private foundations, donations and fundraising. The main goal of all services is to help individuals gain self-sufficiency. A few are listed

below.

Community Action Agency of Somerville (CAAS) helps to keep families and individuals in their home and prevent homelessness. CAAS also runs the Head Start program in Somerville

Somerville Community Corp offers Individual Development Accounts – matched savings account for income eligible persons for higher education or training, making it easier of low income individuals and families to achieve their goals

Greater Boston Legal Services provides free legal assistance to low-income families to help them secure some of their basic necessities of life

Various immigrant social services increase access and remove barriers to health education and social services through direct service, advocacy, leadership and community development.

Special Olympics provides a variety of Olympic-type sports for all children and adults with intellectual disabilities giving them opportunities to develop physical fitness, demonstrate courage, experience joy and participate in sharing of gifts, skills and friendship with the community.

The City's Constituent Services allows residents to dial one number to make service requests and obtain valuable information about services. Calls are tracked and trends identified to better allocate resources.

The City's Family Outreach Program assists residents with family issue problems or who lack information about resources, benefits, services or programs available for low and moderate income residents.

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

The City has a HUD Lead Hazard Abatement grant, which it uses to provide forgivable loans to homeowners for all work necessary to bring a unit into full lead abatement compliance. The City has reached out to homeowners and landlords, including Section 8 landlords, to encourage use of the program. The City's lead program is a critical priority for the City because 2010 US ACS data indicates that almost 94% of the homes in Somerville were built before 1978 and 61% were built before and two-thirds of the units are in two or three family houses.

The City of Somerville is in full compliance with federal Title 1012/1013 regulations, Section J, which requires that lead based paint be addressed in all properties receiving Federal funds for housing rehabilitation. Safe work practices and all requirements under Title 1012/1013 have been fully integrated into existing housing rehabilitation programs, which are funded primarily with CDBG and HOME grants. A fully implemented plan for addressing lead based paint hazards has been in effect in the

City since 2001. Somerville will continue to support and expand the Housing Rehabilitation and Lead Abatement programs, which rehabilitates the existing housing stock while often placing rent restrictions on apartments in multi-family homes. This is especially important in Somerville, where the majority of all units are in two or three-family housing. Somerville's Lead Abatement program, which is funded by a Lead Hazard Control grant from HUD, has been recognized by HUD as a national model. The City is also developing materials to assist homeowners in abating lead paint found in soil on properties, especially in play areas. In July 2017, the city was awarded a new \$1.7M Lead Hazard Reduction Grant from HUD. In program year 2017 the city was able to abate 37 units through its Lead Hazard Reduction program.

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

The City collaborates with local social service agencies to continue efforts to reduce the number of families and individuals living in poverty. Staff focused primarily on supporting programs that raised household incomes and stabilize housing situations. Eliminating poverty is a clear concern of the City. Efforts are constantly underway to improve the quality of life and economic conditions for families, for example:

Public Service programs to assist those emerging from poverty. These include family stabilization services and information and referral including affordable child care, teen job readiness program, etc.

The City works with community development groups to support their efforts to train and uplift people in poverty and invest in economic development programs. The City partners with area agencies on economic development programs for low income neighborhoods. Using CDBG funds, the City has provided for small business assistance and has nurtured microenterprise development.

In 2016, local businesses were assisted and are thriving, 98 low income youth received employment/leadership training, over 2,500 income eligible children/families received nutritious food via the food bank, over 250 non-English speakers participated in ESOL classes to increase economic capacity for their families, over 150 person received housing counseling to remain permanently housed and assistance and hope was provided to many Somerville area residents . Additionally through public participation, citizens had opportunities in meetings throughout the year to offer suggestions on ways to reduce poverty.

See pdf file Public Service numbers y eligible activities

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

In the five year strategy, the City described the institutional structure, including private industry, non-

profit organizations, and public institutions through which it will carry out the affordable and supportive housing strategy. The City assessed strengths and gaps in the delivery system and set forth a plan for improvement. The City aims to eliminate identified gaps and strengthen and integrate the delivery system by pursuing other funding sources for affordable housing as they become available.

The City developed and maintained strong supportive relationships with elected officials at all levels of government. Fiscal responsibility was maintained while developing strategic partnerships with housing advocates, private and nonprofit organizations, business and community groups and residents to exercise leadership in responding to the future of Somerville's housing and community development needs.

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

Housing and social service providers collaborate regularly through participation in the CoC's monthly meetings and its various subcommittee meetings. A City housing division staff member serves as the CoC Lead and is able to serve as a liaison between the City and housing and social service agencies. These meetings also include representatives from agencies serving a broader group of residents at the poverty level, such as Community Action Agency of Somerville, RESPOND, Cambridge and Somerville Legal Services, and others who provide non-housing services such as employment training, mental health counseling, veteran's services, elder services, financial literacy, immigration services and health services.

The CoC also maintains an inventory of housing, as well as, social service providers and includes details such as the subpopulation served as well as the services provided. Several social service agencies have offices located in public housing and attend general meetings of the housing authority to identify problems in advance and have the opportunity to help resolve a crisis immediately. Please see the Public Housing section of the Consolidated Plan for more information regarding the consultation and coordination with the local Public Housing Association, as well as information about the encouragement of public housing residents to become more involved in management of the properties and information about becoming future homeowners.

Developers of housing projects coordinate with the City, the SAHTF Somerville Affordable Housing Trust Fund and typically the Massachusetts Department of Housing and Community Development regarding the provision of state resources to City-supported projects, such as Massachusetts Affordable Housing Trust Funds, State HOME funds, LIHTC and other state housing funding resources. This includes participating in general discussions and consultations on overall housing goals at both the local and state level, as well as discussion with DHCD staff on specific housing development projects that are seeking multiple funding sources. In addition, the City and the Somerville-Arlington CoC coordinate with the State on ESG activities to ensure the best use of prevention and rapid rehousing resources.

The City also consults with MAPC on city planning efforts and also participates in regional efforts such as

Inner Core planning meetings, a middle income housing study and the Metro Mayor's meetings. Also, there are several city-sponsored working groups, including the Union Square Civic Advisory Committee and the Sustainable Neighborhoods Working Group, that include a diverse membership from these different areas to coordinate planning efforts around housing and services within the city. The City also does outreach to these entities in planning for different neighborhoods through Somerville by Design.

The City created strategic partnerships to enhance the availability of resources and leverage services provided to low and moderate income residents and neighborhoods.

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

The Housing Division and Fair Housing Commission are primarily responsible for implementing the action steps. For the implementation timeline, the broader action steps have been categorized into near term, medium term and long term. Implementation efforts for some of the action steps will start in the near term, but will require significant time and continue to the medium or long term timelines. In the near term, the focus is on building the capacity of the Fair Housing Commission in terms of personnel, educational materials and financial resources. Also at this time, the city is completing a revised analysis of impediments to fair housing as it prepares for its submission of a formalized Affirmatively Furthering Fair Housing plan report to HUD due on October of 2017. For a complete copy of the current Implementation Plan, please contact the Housing Division.

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

The City worked closely with all its sub-recipients in order to ensure that the goals and objectives of the HUD programs were adhered to and National Objectives were being met. The Mayor's Office of Strategic Planning (MOSPCD) was responsible for both the financial and program monitoring of sub-recipient activities to provide assurances that the sub-recipients administered federal awarded funds in compliance with federal requirements, ensured that required audits were performed and sub-recipients took prompt corrective action on any audit finding and evaluated the impact of sub-recipient activities to comply with applicable federal regulations. MOSPCD staff monitored CDBG Public Service and ESG contracts for compliance, financial management systems, timeliness and programmatic activity. Staff was committed to providing accurate unduplicated demographic information in IDIS to comply with HUD reporting requirements. Client demographics entered in HMIS for ESG participants was reviewed for data quality.

CDBG projects were assigned to a project manager who was responsible for the negotiation and execution of a contract to implement project activities. All contracts fully addressed all HUD, state and local requirement and included a detail project scope. The project manager, in conjunction with the compliance officer, was also responsible for contract compliance and project management representing the City as grantee. Ongoing technical assistance was provided throughout the contract period.

Sub-recipients entered into detailed agreements with the City to ensure all federal, state and local regulations and criteria were being adhered to and met. Monthly and/or quarterly desk audits of reports and supporting documentation from sub-recipients allowed the City to monitor progress each sub-recipient was making toward its year-end goal(s). On-site monitoring was conducted by MOSPCD to further ensure that overall goals and objectives were being met, timelines were met and required records were maintained to demonstrate compliance with applicable regulations. City staff watched for potential of fraud, waste, mismanagement and/or other opportunities for potential abuse. Contract provisions were in place that provided for the suspension of funds, termination of the contract and disallowance of reimbursement requests during the program year based on performance deficiencies. City staff worked with sub-recipients to correct identified deficiencies through discussion and/or technical assistance, prior to imposing any sanctions.

The City also conducted on-site monitoring of federally funded construction projects to ensure compliance with Davis- Bacon wage laws.

Housing activities were also monitored with the assistance of Housing Inspectors and staff, and where appropriate, with the City's Building Inspectors. This allowed for multiple levels of oversight of various federally funded activities to ensure compliance with all local, state and federal requirements.

See additional text

Additional text

Monitoring included the review of the sub recipient's internal controls to determine if the financial management and accounting system were adequate to account for program funds in accordance with the federal requirements. Monitoring activities included core monitoring areas: activities allowed or disallowed (specific activities identified in the contract agreement); allowable cost (costs paid are reasonable and necessary for the operation and administration of the contract agreement); period of availability of funds (time period authorized for funds to be expended); reporting (reporting requirements contained in contract agreement are being met); and any special provisions. Each sub-recipient received a risk assessment to determine the level of monitoring that should be performed to assure the entity was in compliance with federal program laws and regulations. The risk assessment began with a review of factors such as whether a contractor or sub-recipient was new to federal programs, turnover in key staff positions, past compliance or performance problems, undertaking multiple federally funded activities for the first time and not submitting timely reports. City staff developed a monitoring plan as a result of the risk assessment process, which included a combination of desk and on-site monitoring. On-site monitoring letters were prepared. Corrective action measures were implemented with proof of satisfactory completion to close out the monitoring process. Communications between the recipient and sub-recipient were an important facet of the monitoring process. Telephone interviews and e-mail communications were used to stay abreast of activities and changes to programs and policies relevant to a particular contract agreement. Additional local media tools were used in the review of sub-recipients (newspapers, radio and television). City staff collected annual reports, performed desk audits and conducted site visits to audit client files and verify compliance with client eligibility, services, case management and other contract compliance requirements.

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.

As outlined in the Five Year Consolidated Plan, the One Year Action Plan and the Consolidated Annual Action Plan (CAPER), the City of Somerville follows a public participation plan designed to solicit citizen input and opportunities to comment, while at the same time helping to inform the public of resources, emerging needs, and restrictions and limitations of available resources. The Citizen Participation Plan describes the roles, responsibilities and contact information for the responsible entities involved in administering, reviewing and approving the activities included in the 2016-2017 CAPER. Besides the public hearings held during the program year, the City had broad discussions of the One Year Action Plan process within open committee meetings and Board of Aldermen meetings.

During the 2012-2013 HUD year, the City of Somerville held 4 public hearings and many other focus groups in order to develop the City's 2013-2017 Consolidated Plan. Outreach for these programs included hearing notices in local newspapers, announcements on the City's website, and other announcements to interested persons and groups.

Moving forward into program year 2017-2018, the City of Somerville will look to continue the public participation process through outreach to potential interest groups and constituencies, and through increasing the number of public forums with which to gather input into the City's HUD funded programs. The City may consider continuing its use of focus groups as a means to gather important input into the design of future programs and projects.

For the purpose of the reporting on the 2016-2017 program year, the City held a public hearing at the ____ on ____ to review the results of the draft CAPER. Following the meeting, a public comment period was made open from ____ to _____. Copies of the draft CAPER were made available for the public to viewing and residents and members of the public were able to submit comments via several methods including in person, in writing, via e-mail or by contacting the Office of Strategic Planning by telephone. _____ comments were received.

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 City of Somerville has not changed the objectives in its CDBG program and continues to strategically use CDBG funds to maximize leverage for infrastructure and public facility improvements, housing development and homeownership, public services, commercial revitalization, and planning and administrative activities. Somerville went through an extensive planning process where it identified a number of goals and objectives in the five year plan that were intended to guide the programs and activities undertaken to aid and serve the low to moderate income residents of the community. In this the third year, the city continuously assesses and reviews its policies, procedures and programs in order to improve on the effective and efficient delivery of its grant programs. There is continued need for CDBG funds to fulfill objectives in all the above categories hence no changes are recommended based on Somerville's experiences.

The City pursued all potential resources indicated in the Consolidated Plan by working with developers, non-profits and other government agencies to leverage a variety of funds for affordable housing projects and programs, opportunities for low and moderate income people to become homeowners, assistance to homeless persons, public service programs, job training and education, community development activities directed toward revitalizing neighborhoods and economic development.

The Office of Strategic Planning and Community Development continually seeks to revise and improve standard practices and operating procedures, e.g. filing systems, program administration, record keeping, etc.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.

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

Please list those projects that should have been inspected on-site this program year based upon the schedule in §92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

As part of the process of administering the HOME programs and activities, the City carries out housing quality standards re-inspections of HOME assisted rental units to determine compliance with housing codes and other applicable regulations. The schedule for inspections is:

1. Every year for Tenant Based Rental assisted units and rental properties containing 25 or more HOME assisted units,
2. Every other year for properties containing from 5 to 24 HOME assisted units, and

Every third year for properties containing 4 or fewer HOME assisted units.

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

In accordance with the regulations of the HOME Program and in furtherance of the City of Somerville's commitment to non-discrimination and equal housing opportunity, the Division establishes these procedures to affirmatively market units in rental and homebuyer projects containing five (5) or more HOME-assisted housing units (the "Covered Units").

It is the Affirmative Marketing Policy of the Division to assure that individuals who normally might not apply for available housing units without special outreach be informed of available units, be encouraged to apply, and have an equal opportunity to rent or own the available housing units being offered.

The Policy covers the following areas:

1. Methods for the Division to use to inform the public, potential tenants and potential owners about federal fair housing laws and affirmative marketing policies and procedures
2. Requirements and practices each Beneficiary of a HOME-funded housing project with Covered Units must follow in order to carry out the Division's Policy.
3. Procedures to be used by Beneficiaries to inform and solicit applications from persons in the housing market area who are not likely to apply for housing without special outreach

4. Records that will be kept describing actions taken by the Division and Beneficiaries to affirmatively market Covered Units and records to assess the results of these actions
5. Description of how the Division shall assess the success of affirmative marketing actions and what corrective actions shall be taken

The City's CHDO and other developers commit to doing affirmative outreach in marketing all HOME-Assisted units. Homeowners participating in the Housing Rehabilitation program with properties containing five or more Home-Assisted rental units are required to affirmatively market these vacant units. In addition, the City's Lead Paint Hazard Program has implemented an affirmative marketing policy when vacant units receive lead abatement work.

Refer to IDIS reports to describe the amount and use of program income for projects, including the number of projects and owner and tenant characteristics

In Program Year 2016-2017 a total of \$426,205 in HOME program income was drawn down. This included \$57,132 on tenant based rental assistance, 69,073 in administrative costs and \$300,000 on the Mystic WaterWorks project which will create 25 affordable purpose built units for seniors.

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)

- Utilize the linkage fee charged to developers building commercial development in the City. The full amount of the linkage fee goes into the City's Affordable Housing Trust Fund.
 - Continue to expand the 100 Homes Program to purchase existing housing and provide affordable rental units through deed restrictions.
 - Providing affordable housing to homebuyers at 80% and 110% AMI and rental housing to tenants at 50% and 80% AMI through the application of the City's inclusionary housing ordinance.
 - Continue to leverage Community Preservation funds to achieve joint goals in conjunction with the Somerville Affordable Housing Trust
 - Focusing on family-sized housing development, either through new construction or acquisition/rehab efforts.
 - Exploring activities and possibly expanding eligibility of Inclusionary rental and homeownership units to assist middle-income households with obtaining housing in Somerville.
 - Review and evaluate the recommendations of the Sustainable Neighborhoods Working Group, a multidisciplinary group of housing experts, community members and advocates to explore creative solutions to combat displacement and the rising cost of housing in the city.
- Targeting public services and some HOME funds to programs that provide transitional housing.

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

ESG Supplement to the CAPER in *e-snaps*

For Paperwork Reduction Act

1. Recipient Information—All Recipients Complete

Basic Grant Information

Recipient Name	SOMERVILLE
Organizational DUNS Number	076621572
EIN/TIN Number	046001414
Identify the Field Office	BOSTON
Identify CoC(s) in which the recipient or sub recipient(s) will provide ESG assistance	Somerville CoC

ESG Contact Name

Prefix	0
First Name	Alan
Middle Name	0
Last Name	Inacio
Suffix	0
Title	Director of Finance and Administration

ESG Contact Address

Street Address 1	93 Highland Avenue
Street Address 2	0
City	Somerville
State	MA
ZIP Code	-
Phone Number	6176256600
Extension	2539
Fax Number	0
Email Address	ainacio@somervillema.gov

ESG Secondary Contact

Prefix	Ms
First Name	Elizabeth
Last Name	Twomey
Suffix	0
Title	Compliance Officer

Phone Number 6176256600
Extension 2527
Email Address etwomey@somervillema.gov

2. Reporting Period—All Recipients Complete

Program Year Start Date 07/01/2016
Program Year End Date 06/30/2017

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

Subrecipient or Contractor Name: SOMERVILLE

City: SOMERVILLE

State: MA

Zip Code: 02143,

DUNS Number: 076621572

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Unit of Government

ESG Subgrant or Contract Award Amount: 14418

Subrecipient or Contractor Name: SOMERVILLE HOMELESS COALITION

City: Somerville

State: MA

Zip Code: 02144, 0006

DUNS Number: 847408804

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 124547

Subrecipient or Contractor Name: CASPAR

City: Cambridge

State: MA

Zip Code: 02139, 4201

DUNS Number: 781700265

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 21000

Subrecipient or Contractor Name: CATHOLIC CHARITIES

City: Boston

State: MA

Zip Code: 02210, 1276

DUNS Number: 108851049

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 12626

Subrecipient or Contractor Name: RESPOND INC

City: Somerville

State: MA

Zip Code: 02143, 3032

DUNS Number: 121625057

Is subrecipient a victim services provider: Y

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 30900

DRAFT

CR-65 - Persons Assisted

4. Persons Served

4a. Complete for Homelessness Prevention Activities

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

Table 16 – Household Information for Homeless Prevention Activities

4b. Complete for Rapid Re-Housing Activities

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

Table 17 – Household Information for Rapid Re-Housing Activities

4c. Complete for Shelter

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

Table 18 – Shelter Information

DRAFT

4d. Street Outreach

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

Table 19 – Household Information for Street Outreach

4e. Totals for all Persons Served with ESG

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

Table 20 – Household Information for Persons Served with ESG

5. Gender—Complete for All Activities

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

Table 21 – Gender Information

6. Age—Complete for All Activities

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

Table 22 – Age Information

7. Special Populations Served—Complete for All Activities

Number of Persons in Households				
Subpopulation	Total	Total Persons Served – Prevention	Total Persons Served – RRH	Total Persons Served in Emergency Shelters
Veterans	0	0	0	0
Victims of Domestic Violence	0	0	0	0
Elderly	0	0	0	0
HIV/AIDS	0	0	0	0
Chronically Homeless	0	0	0	0
Persons with Disabilities:				
Severely Mentally Ill	0	0	0	0
Chronic Substance Abuse	0	0	0	0
Other Disability	0	0	0	0
Total (Unduplicated if possible)	0	0	0	0

Table 23 – Special Population Served

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	54,170
Total Number of bed-nights provided	50,299
Capacity Utilization	92.85%

Table 24 – Shelter Capacity

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

The City of Somerville and its Housing Staff are lead staff to the CoC and therefore collaborate extensively with the Somerville-Arlington CoC. Coordination takes place through monthly meetings between CoC members, many of whom are ESG sub-recipients. MOSPCD staff consulted with the CoC on funding emergency shelters and MOSPCD staff attended numerous meetings regarding shelters' development of coordinated entry and rapid re-housing programs. The data and evaluation working group of the CoC continues to discuss performance of all programs on progress in reducing homelessness. The performance goal of safe and affordable housing has three indicators: decrease housing burden, reduce number of people entering homelessness and achievement of quick and stable housing.

The ESG program is designed to be the first step in a continuum of assistance to help clients quickly regain stability in permanent housing after experiencing a housing crisis and/or homelessness. Eligible activities under the grant included: Emergency Shelter and Essential Services, Homelessness Prevention, Rapid Re-Housing, HMIS Reporting and Administration. The ESG program has achieved its goals and objectives. The majority of the funds have been expended. Client data can be found in section CR-65, populated from e-cart which, for the second time, provided aggregate information from HMIS on the number of recipients assisted with ESG

CR-75 – Expenditures

11. Expenditures

11a. ESG Expenditures for Homelessness Prevention

	Dollar Amount of Expenditures in Program Year		
	2014	2015	2016
Expenditures for Rental Assistance	0	0	8,169
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	0	3,892
Expenditures for Housing Relocation & Stabilization Services - Services	0	0	1,256
Expenditures for Homeless Prevention under Emergency Shelter Grants Program	0	0	27,579
Subtotal Homelessness Prevention	0	0	40,896

Table 25 – ESG Expenditures for Homelessness Prevention

11b. ESG Expenditures for Rapid Re-Housing

	Dollar Amount of Expenditures in Program Year		
	2014	2015	2016
Expenditures for Rental Assistance	0	0	1,252
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	0	4,402
Expenditures for Housing Relocation & Stabilization Services - Services	0	0	0
Expenditures for Homeless Assistance under Emergency Shelter Grants Program	0	0	13,746
Subtotal Rapid Re-Housing	0	0	19,400

Table 26 – ESG Expenditures for Rapid Re-Housing

11c. ESG Expenditures for Emergency Shelter

	Dollar Amount of Expenditures in Program Year		
	2014	2015	2016
Essential Services	0	1,865	0
Operations	0	0	114,642
Renovation	0	0	0

Major Rehab	0	0	0
Conversion	0	0	0
Subtotal	0	1,865	114,642

Table 27 – ESG Expenditures for Emergency Shelter

11d. Other Grant Expenditures

	Dollar Amount of Expenditures in Program Year		
	2014	2015	2016
Street Outreach	0	0	0
HMIS	193	0	6,750
Administration	0	0	12,380

Table 28 - Other Grant Expenditures

11e. Total ESG Grant Funds

Total ESG Funds Expended	2014	2015	2016
	193	1,865	194,068

Table 29 - Total ESG Funds Expended

11f. Match Source

	2014	2015	2016
Other Non-ESG HUD Funds	0	0	7,000
Other Federal Funds	0	0	524,000
State Government	0	0	124,220
Local Government	0	0	14,418
Private Funds	0	0	136,447

Other	0	0	102,500
Fees	0	0	0
Program Income	0	0	0
Total Match Amount	0	0	908,585

Table 30 - Other Funds Expended on Eligible ESG Activities

11g. Total

Total Amount of Funds Expended on ESG Activities	2014	2015	2016
1,1	193	1,865	1,102,653

Table 31 - Total Amount of Funds Expended on ESG Activities