

C A P E R

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**Somerville
Massachusetts**



Consolidated Annual Performance and Evaluation Report

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Fourth Program Year CAPER

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EXECUTIVE SUMMARY

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 (ESG) program. For the program year 2011-2012 (July 1, 2011 – to June 30, 2012), Somerville received \$2,585,669 in CDBG funds, \$850,413 in HOME funds, and \$196,502 in ESG funds (This figure includes the first allocation of \$125,761 and the Substantial Amendment of \$70,741). During that same time period the City of Somerville expended \$2,922,238 in CDBG funds, \$294,589 in HOME funds, and \$103,770 in ESG funds. It should be noted that the CDBG and HOME funds expended included prior years budgeted and unexpended CDBG and HOME funds. Since 1989, the City has received over \$94 million of these funds in order to address vital infrastructure projects and programs within the City.

Each year, as part of the process of utilizing and administering HUD funds, the City of Somerville compiles a Consolidated Annual Performance Evaluation Report, or CAPER. This report describes how the City of Somerville used these resources over the previous fiscal year, what progress or accomplishments were achieved through these expenditures, and how these accomplishments fit within the larger context of the City's Five Year Consolidated Plan goals and objectives.

Below are brief descriptions of the different federal funds the City of Somerville receives, and the intended purpose(s) of those federal funds.

Community Development Block Grant Funds (CDBG):

The CDBG program is the federal government's primary program for promoting community revitalization throughout the country. The CDBG program has three general National Objectives:

- Benefit low-and-moderate income persons;
- Aid in the prevention or elimination of slums or blight; and,
- Meet other community development needs that present a serious and immediate threat to the health or welfare of the community.

CDBG funds are used for a wide range of community development activities directed toward neighborhood revitalization, economic development, and improved community facilities and services. Activities that can be funded with CDBG dollars include, but are not limited to; acquisition of real property, acquisition and construction of public works and facilities, code enforcement, reconstruction and rehabilitation of residential and nonresidential properties, homeownership assistance, micro-enterprise assistance, and the provision of public services such as employment, childcare, health, elderly services, education, and fair housing counseling.

HOME Investment Partnership Act (HOME):

HOME is the largest federal entitlement grant to state and local governments designed exclusively to create affordable housing for low-income households.

The City of Somerville can choose among a broad range of eligible activities consistent with its Consolidated Plan, and can use HOME funds to provide home purchase financing for new homebuyers or rehabilitation financing assistance to eligible homeowners; build or rehabilitate

housing for rent or ownership; or for "other reasonable and necessary expenses related to the development of non-luxury housing," including site acquisition or improvement, demolition of dilapidated housing to make way for HOME-assisted development, and payment of relocation expenses. The City of Somerville may also use HOME funds to provide tenant-based rental assistance contracts of up to 2 years if such activity is consistent with the Consolidated Plan and justified under local market conditions.

Emergency Solutions Grant (ESG):

The Emergency Solutions Grant program provides homeless persons with basic shelter and essential supportive services. It can assist with the operational costs of the shelter facility, and for the administration of the grant. ESG also provides short-term homeless prevention assistance to persons at imminent risk of losing their own housing due to eviction, foreclosure, or utility shutoffs.

ESG funds are available for street outreach – essential services; emergency shelter (renovation, operation, essential service); rapid re-housing (housing relocation and stabilization services); homelessness prevention (housing relocation and stabilization, tenant-based rental assistance); HMIS data collection; and grant administration.

Community Development Block Grant Recovery Funds (CDBG-R):

The American Recovery and Reinvestment Act of 2009 (ARRA) was an effort to jumpstart the American economy, save and create millions of jobs, and address long-neglected challenges so our county can thrive in the 21st century.

The CDBG-R program eligible activities are designed to stabilize neighborhoods and create jobs.

Homelessness Prevention and Rapid Re-Housing Program (HPRP):

HPRP was authorized under the Title XII of ARRA to provide financial assistance and services to prevent individuals and families from becoming homeless and help those who are experiencing homelessness to be quickly re-housed and stabilized. This was the third and last year for these funds.

Lead Hazard Abatement Program

The Lead Hazard Abatement Program provides an incentive for property owners to comply with lead laws, create and maintain affordable rental housing, and establish a safe living environment for Somerville citizens.

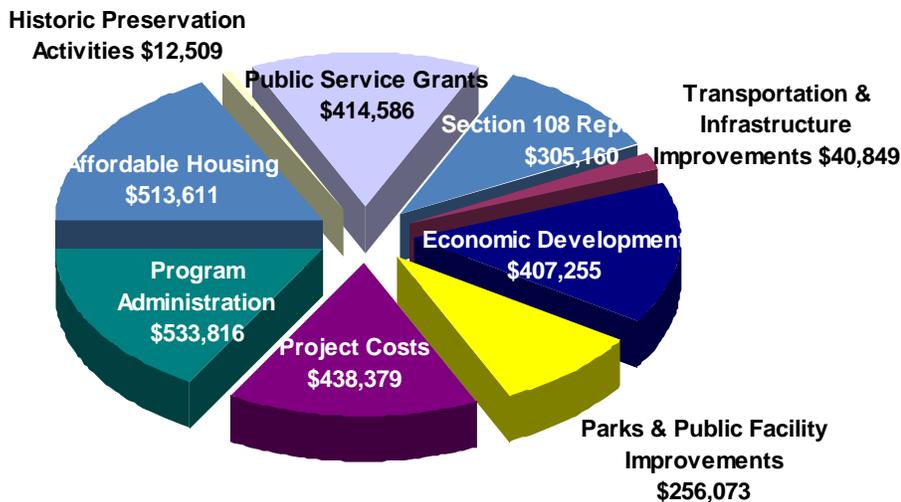
Community Challenge Grant

In 2011, the City of Somerville became the only municipality in Massachusetts to receive a Community Challenge Planning Grant from HUD, USDOT and EPA. The award is helping the City and its partners to expedite planning for transit-based revitalization, with major grant-funded activities including creation of a land bank for affordable housing around new transit stations.

Overview

In Program Year 2011-2012 the City of Somerville expended \$3,320,597 in CDBG, HOME, and ESG funds primarily in support of low and moderate-income persons in the community. Somerville expended these funds in support of different initiatives outlined in the City's One Year Action Plan and its Five Year Consolidated Plan. Overall spending by category was as follows:

City of Somerville 2011 - 2012 CDBG Expenditure

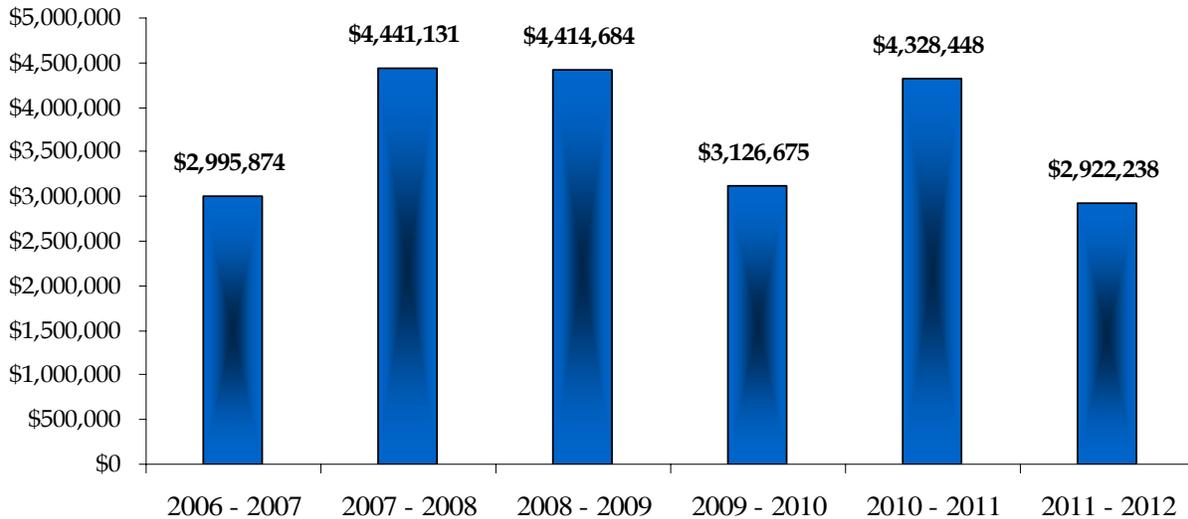


The City's CDBG expenditure is broken down into the following nine categories:

- 1) Economic & Community Development;
- 2) Transportation & Infrastructure;
- 3) Parks & Open Space;
- 4) Historic Preservation;
- 5) Housing;
- 6) Public Services;
- 7) Section 108 Loan Repayment;
- 8) Project Cost
- 9) Planning & Administration.

The City's 2011-2012 CDBG entitlement funding from HUD was a decrease of 16.7% from the previous fiscal year of \$3,104,106.

City of Somerville
Fiscal Year Comparison of HUD CDBG Expenditures 2005-2012



Organization of the Report

- Assessment of Goals & Objectives
- Supplemental Narratives
- Funds Leveraged
- Citizen Participation Plan

The appendices to this report include a listing of all projects with financial activity for this past year, a listing of all projects (with or without financial activity), and a map of the City of Somerville.

Contact Information

Inherent in the successful planning and execution of these programs and projects is the review and input of City residents and stakeholders. The Office of Strategic Planning and Community Development (OSPCD) and the City of Somerville overall is interested in and welcomes public input into these efforts. OSPCD also makes itself available to answer questions and discuss various aspects of its programs. If you would like more information on any of the programs described in this report please contact the Office of Strategic Planning and Community Development at (617) 625-6600 ext. 2500.

INTRODUCTION

The City of Somerville plans its annual housing, economic development, and other HUD funds projects with the guidance of the City's Five Year Consolidated Plan. This Five Year Consolidated Plan currently runs from 2008–2013, and contains assessments of various needs within the City, as well as goals for addressing those needs over that five-year interval.

Annually, the City prepares a One Year Action Plan, which contains specific projects and programs to meet identified needs. These One Year Action Plans, while more detailed and tailored to the specific needs of the City for that particular year, are still guided by the broader needs assessments identified in the Five Year Consolidated Plan.

At the end of each One Year Action Plan, the City compiles a report, which explains, highlights and summarizes the goals and accomplishments for that year. This report is called the Consolidated Annual Performance Evaluation Report (CAPER).

Program Goals

The City of Somerville strives to provide a “thriving economy, a healthy community, a safe environment and quality lifestyle, and to promote maximum citizen participation in government.” The City of Somerville seeks to support these goals for low-and-moderate income persons through grants of resources from the department of Housing and Urban Development (HUD) and from other State and Local sources. The federal HUD resources are granted to the City in the form of Community Development Block Grants (CDBG), HOME Investment Partnership (HOME) funds, and Emergency Solutions Grant (ESG) funds. These funds are administered by the City of Somerville through the Mayor's Office of Strategic Planning and Community Development (OSPCD).

CDBG Funds:

HUD describes the nature of these funds as providing “annual grants on a formula basis to entitled communities to carry out a wide range of community development activities directed toward neighborhood revitalization, economic development, and improved community facilities and services.”¹

HOME Funds:

HUD describes the nature of these funds as providing “funds allocated using a formula designed to reflect relative housing needs”² within the community. Eligible uses of funds include “homeownership down payment; tenant-based assistance, housing rehabilitation; assistance to homebuyers; and new construction of housing.”

Emergency Solutions Grant Funds:

HUD describes the ESG program as “grants to states, metropolitan cities, urban counties, and territories based on the formula used for... CDBGs. Eligible activities include emergency shelter, street outreach and essential services, HMIS, rapid re-housing, and homeless prevention.

Working within the framework of the Five Year Consolidated Plan and the Annual One Year Action Plans, the City of Somerville utilizes these and other funds to meet critical community

¹ 2005 Programs of HUD, published by the U.S. Department of Housing and Urban Development. Page 6

² 2005 Programs of HUD, published by the U.S. Department of Housing and Urban Development. Page 15

needs, enhance neighborhoods, improve facilities, and create economic opportunities for more of our residents. This CAPER and the information contained within, reflects the progress we have made over the last year.

ASSESSMENT OF GOALS AND OBJECTIVES

Economic Development

Boynton Yards

The purpose of the study is to analyze the existing transportation and municipal utilities network, and prepare conceptual design alternatives based on projected redevelopment potential in the Boynton Yards area taking into account the siting of a new Green Line Station in Union Square on the Fitchburg Commuter Rail Line. This work is being done in advance of the new MBTA Green Line extension into Union Square and will be a key component of the City's plans for the area. This project involves data gathering and analysis, identification of alternatives, the public input process, and City selection of the preferred alternative.

The consultants with cooperation from OSPCD have (1) completed the gathering of primary data necessary for analysis, (2) convened a series of focus groups with businesses and property owners in the project area to discuss alternative designs, (3) are currently working on developing detailed design alternatives and a final report of the study area. The activities completed in program year 2011 were necessary to complete the commercial and industrial infrastructure and other improvements that are underway in the Boynton Yards area.

Arts Union:

Arts Union continues to cultivate and promote Union Square's diverse artist and business community. In its fifth year, Arts Union presented a series of cultural events/performances; conducted weekend craft markets; and continued with cultural tours.

In program year 2011 a feasibility study was performed with the firm, Fort Point Consulting, to evaluate four target parcels in the square for arts related economic redevelopment opportunities. Additional steps were taken to prepare the procurement of services for the construction of the Beacon project. These activities were completed as part of commercial and industrial improvements in the Union Square area to support economic development opportunities for arts related activities. CDBG funding for ArtsUnion is also used to leverage a state grant from the Massachusetts Cultural Commission designed to promote the arts as an economic development opportunity.

Union Square Farmers' Market:

Union Square Main Streets with The City of Somerville brings the Union Square Farmers Market each Saturday from June through the end of October from 9-1pm. The market showcases Massachusetts grown produce, greens, fruits and berries, fresh cut flowers, cheese, chocolate, breads, and other baked goods. Union Square Main Streets provides supervisory oversight of the market and coordinates the community-based committee contributing to the market. They also promote the market through posters, e-mails, outreach activities, etc, and supplement the primary activity by maintaining a schedule of community programming and educational activities at the market such as musical and other performances, children's activities and cooking demonstrations.

The Union Square Farmer's Market concluded another successful campaign in 2011: the market again increased the number of vendors from the previous year and improved the quality and diversity of goods available. Anecdotal evidence from local business is that the amount of visitors (and corresponding foot traffic for retail) continues to increase. Vendors also mention that the Union Square market is among their most profitable venues.

Union Square Main Streets:

Union Square Main Streets creates a vibrant neighborhood by enhancing the Union Square business district and surrounding neighborhoods through active community collaboration. By enhancing the artistic and ethnic strengths of the neighborhood we seek to drive commercial and economic development. The program promotes local business development opportunities including elements of the food industry, the creative arts, and the dense unique fabric of our New England square.

Main Streets succeeded in ways large and small in 2011. Their flagship event, Fluff Festival, attracted its largest crowd to date and attempted a new strategy by closing down Somerville Avenue next to the main plaza. Main Streets has also continued to successfully run the co-working space, Design Annex, debuted a new weekday series called "Slice & Swirl", and participated in key public policy decisions on issues ranging from the de-elevation of McGrath Highway to the need for a food truck ordinance. Through these activities the main streets organization met several goals and accomplishments in program year 2011 including providing direct financial, technical, and micro-enterprise assistance to the local area businesses.

East Somerville Main Streets:

East Somerville Main Streets (ESMS), formed in 2006, is a non-profit public-private partnership between East Somerville residents, business owners, community leaders, the City of Somerville, and the National Main Street Center. ESMS is community led. It works to give the community the tools it needs to generate ideas, plan and revitalize East Somerville.

ESMS helps East Somerville grow as a thriving, safe, friendly neighborhood and commercial district by supporting existing and new businesses; creating a cleaner, greener, pedestrian-friendly area; strengthen the business community; increasing collaboration and connection between residents; and finally, by marketing East Somerville as a destination within the region. ESMS uses a nationally tested framework where committees address the variety of issues faced by commercial districts: design, promotion, economic support and development, and organization.

2012 marked East Somerville Main Streets sixth year as a solid organization, and demonstrated its continued success. With the support of community Development Block Grant funds, ESMS was able to continue growing programs and initiatives offered which met several goals and objectives including providing direct financial, technical, and micro-enterprise assistance to local area businesses. ESMS also expanded its ability to leverage funds received, fundraising approximately \$25,000 in additional grants and donations during calendar year 2012.

Kiley Barrel Pre-Development:

The City has conducted title research and boundary surveys in anticipation of additional property acquisitions. All sites surveyed: 4 Milk Place, 258 Somerville Avenue and 26-28 Prospect Street are located adjacent to the former Kiley Barrel Brownfield site and are required for redevelopment of the whole site with the North Prospect Block.

The activities undertaken in program year 2011 were required as part of additional commercial and industrial land acquisition activities currently underway in Union Square which will promote future business development in the area.

Storefront Improvement Program:

The City provides technical and financial assistance to property owners and tenants in eligible areas in the City seeking to renovate or upgrade their commercial building facades. An architectural consultant retained by the City is available to provide design and bidding assistance to applicants from the project conceptualization stage to the final assessment stage at no cost to the applicants. Applicants hire licensed contractors to implement the conceptual design and to implement the City approved plans. The program provides matching grants on a reimbursement basis for up to 75% of the total project cost at a cap of \$35,000, whichever the lowest amount. Merchants are required to match the investment with a minimum of 25% of the total project's cost. The objective of the Program is to support businesses in the renovations of their premises to maintain and enhance viable commercial districts.

In program year 2011, The City completed seven new storefront improvement projects and will continue on one on-going project in the FY13 ahead. A total of six applicants received design services during the reporting year. Services were related to project analysis, conceptualization, preliminary design, bidding, final drawings, and on-site final assessment. Applicants focused their efforts in providing suitable branding and store information to accomplish best practices in the design of their storefronts. Since 2003, the program has provided design services to 20 businesses and property owners and helped finance 36 storefront improvements projects throughout the City.

The program year 2011 entitlement supported 14 storefront improvement projects and helped to create six full time jobs in Somerville. Data for storefront projects that expended funds in program year 2011 is shown in the table below.

| Participant | Address | Funding |
|-----------------------------|--------------------|------------------|
| Mariachi Foods Inc. (Potro) | 61 Union Square | \$6,985 |
| Advance Dental Care, LLC | 36 Bow Street | \$3,400 |
| 130 Broadway LLC | 130 Broadway | \$1,028 |
| 131 Broadway LLC | 131 Broadway | \$26,465 |
| 130 Broadway LLC | 130 Broadway | \$36,007 |
| 130 Broadway LLC | 130 Broadway | \$12,500 |
| 131 Broadway LLC | 131 Broadway | \$24,000 |
| Bostonian Florist Inc. | 92 Highland Avenue | \$5,962 |
| Aguacate Verde LLC | 13 Elm Street | \$5,040 |
| Casa B LLC | 253 Washington | \$25,000 |
| Millers Rivers | 561 Windsor Street | \$26,789 |
| Guilman and Guidelli | 561 Windsor Street | \$26,789 |
| Fasika Restaurant | 145 Broadway | \$35,000 |
| Architectural Consulting | | \$17,200 |
| | | \$252,166 |

Retail Best Practices:

The City provides technical assistance to retail property owners and their tenants in the City to establish venues that support the retail sector. The Retail Best Practice Program is a two phase program that supports the retail sector, the second largest economic activity in Somerville, and to create jobs within it. The program offers a workshop and one-on-one consulting sessions with a retail specialist. Topics covered by the workshop include marketing, business best practices, merchandising, branding, social media, and façade design. Retailers are trained on best practices within the industry, to help them attract and retain new and existing customers. Later on, participants are encouraged to participate in one-on-one sessions with the retail specialist retained by the City. Consulting services are offered to qualified retailers and restaurateurs established in eligible Census-Tract areas and micro-enterprise retailers. The consultant provides the retail store participant with a five-page written analysis report highlighting areas-to-improve, potential strategies and recommendations.

Since 2009, the City retained professional services from Graber Marketing, now re-branded as Retail Visioning. In FY12, Graber was paid \$12,500 for consulting services delivered in FY11 and reported in the CAPER report for FY11. Since the program inception, a total of 48 retailers, including restaurants, have benefited from the retail best practices program. These accomplishments have met multiple goals of the program including providing technical and micro-enterprise assistance to local area businesses.

| Vendor | Service | Funding |
|------------------|---------------------|-----------------|
| Retail Visioning | Consulting Services | \$12,500 |
| | | \$12,500 |

A summary of the CDBG funds spent on Economic Development activities are shown below.

| Project | PY 11 Expenditure | Accomplishments |
|------------------------------|--------------------------|--|
| Store Front Improvements | \$252,166 | 20 businesses assisted and 36 projects funded over life of program |
| Boynton Yard | \$53,147 | Commercial and Industrial improvement activities completed in support of business development and job creation |
| East Somerville Main Streets | \$33,750 | Technical and microenterprise assistance provided to local businesses |
| Union Square Main Streets | \$30,000 | Technical and microenterprise assistance provided to local businesses |
| Arts Union | \$18,900 | Commercial and Industrial improvements in support of arts related business development and job creation |
| Retail Best Practices | \$12,500 | Technical and microenterprise assistance provided to local businesses |
| Union Square Farmers Market | \$6,000 | Technical and microenterprise assistance provided to local businesses |
| Kiley Barrel | \$793 | Commercial and Industrial improvement activities completed in support of business development and job creation |
| Total | \$407,255 | |

Evaluation of Goals

The City's Five Year Consolidated Plan lays out a number of objectives, which includes encouraging investment in underutilized areas, enhancing the vitality of existing commercial districts, increasing job opportunities, promoting job readiness, and building partnerships between the City and the business community. The City is focused on creating jobs and opportunities where they are needed, to develop mixed use communities where residents can live, work, shop and socialize.

The City of Somerville continued to make progress towards its 5 Year Consolidated Plan Goals in 2011-2012 in the areas of Economic Development. In the fourth year of this five year plan, the City has made serious progress in achieving its goals. A rezoning proposal for the Broadway Corridor from Winter Hill to Sullivan Square was ordained by the Board of Aldermen, construction of the new Assembly Square Drive is underway and the City has begun land use and infrastructure planning in Boynton Yards and the Inner Belt/Brickbottom districts. The City established a new relationship with Artisans Asylum, a local fabrication laboratory that supports arts and business startups and continues to work with the two main street organizations to enhance the business environment in low-moderate income neighborhoods.

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

Transportation & Infrastructure Improvements

East Broadway Streetscape:

After years of community process in planning and design, the City has brought the design for the Broadway Streetscape project to full design. This design calls for the reduction of one travel lane in each direction, widened sidewalks with amenities, new bike lanes, and plaza areas at key nodes targeted for economic development. The \$9 million project has been fully funded, and construction is anticipated to begin in early 2012.

Accomplishments within the last year include the completion of construction design, state and federal approvals, and necessary budgets required as part of ongoing sidewalk and street improvements in the East Somerville NRSA.

Community Path Design & Construction:

This project is to design an extension of the existing Somerville Community Path from its existing terminus at Cedar Street to Lowell Street. The project design has been finalized and the project has been advertised for bids. The City expects MassDOT to start construction on the project in the spring of 2013. The City expended \$31,407.18 in CDBG funds to finalize the design of the path.

| Project | PY11 Expenditure | Accomplishment |
|------------------------------|-----------------------------|---|
| East Broadway StreetScape | \$4,547 | Completed activities required to complete sidewalk and street improvement projects currently underway |
| Community Path & Design | \$36,302 | Completed activities required to complete street improvements along the community path |
| Total | \$40,849 | |

Evaluation of Goals

Access to transportation is critical to the economic vitality of the City of Somerville both in terms of attracting new businesses that will bring jobs to the City and in facilitating Somerville residents' access to jobs throughout the region. The continued progress on the design of the Green Line Extension and the new Orange Line Station in Assembly Square will result in having 85% of the residential population living within ½ mile of rapid transit whereas today, only 15% of the population has easy rapid transit access. Planning for Union Square, Brickbottom and Inner Belt are underway to ensure that City residents and businesses benefit from these new opportunities.

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

Parks & Open Space

Street Tree Planting Program:

Somerville has continued to execute bi-annual CDBG funded tree plantings in low to moderate income sections of the city where the planting will have the most beneficial impact. In the spring of 2012 86 trees were planted and approximately 90 trees will be planted again in the fall of 2012. The goal of the tree planting is to expand the city's urban tree canopy in addition to assisting with improving air quality, storm water management, create shade and beautify the city.

Harris Park Design:

The newly located and renamed Chuckie Harris Park at 15-25 Cross Street was acquired with a State Grant from the Massachusetts Department of Conservation Services. Since acquisition, a survey of the site was completed, a landscape architecture firm was hired, and a new park design was developed through a comprehensive community process. This summer a landscape contractor has been hired and construction is now underway and is expected to be completed by July 2013.

North Street Veterans Playground

The development of new landscape plans for a complete renovation of the existing park is underway. A survey of the park was completed, and new landscape plans were developed after a comprehensive community process which included translation services. Features of the new park will include play areas for younger and older children, family gathering spaces, a water feature, small planted hills, new tree plantings, and a new park layout that will provide for increased visibility and security.

Morse-Kelley

The renovation of the Morse-Kelley Playground was completed in July 2012 and the design has been a notable success incorporating community gardens, skateboard features, basketball and stickball courts, a covered pavilion, a tot-lot, improved ADA access, a new entrance stairway from an adjacent street, and a community mural. The Morse-Kelley renovation is part of the City's effort to create a "recreation destination" in Central Somerville through complementary renovations to Morse-Kelley and nearby Dickerman Playgrounds.

Dickerman

Dickerman Playground was completed in July 2012 in tandem with Morse-Kelley Playground. The park is on two levels and the new design includes a green space, paths, seating, and a Bocce court on one level and a renovated play structure, new water play, irrigation, and new tables and chairs on the second lower level.

Quincy Street Park:

The City has completed the landscape plans for Quincy Street Park and the construction is underway. This new design plan will provide a natural wooded park space that maintains some of the "wild" qualities of the original neighborhood space including native species and bird habitats that will serve as an outdoor classroom for local elementary schools.

Kemp Nut Park (Ed Leathers Park):

With the acquisition of two adjacent land parcels completed, the City will extend Ed Leathers Park, formerly known as the Kemp Nut site. The City has conducted environmental testing of

the soils and the building on site and no DEP reportable conditions were discovered. The property was also recently surveyed as a first step in the development of new landscape plans. Next steps will be to issue a Design RFP and hire a landscape architect to develop the construction documents.

Zero New Washington Street:

While the main body of park construction was completed in prior years, some additional signage was required, and it was determined that additional design services were needed to provide for a second round of landscape improvements.

Perry Park

This park has been very popular since it opened however additional signage was necessary to post park rules.

PY10 2011-2012 Parks and Open Space Accomplishments

| Projects | PY 11 expenditures | Accomplishments |
|-------------------------------------|---------------------------|------------------------|
| STREET TREE PLANTING PROGRAM | \$125,622 | 86 trees planted |
| HARRIS PARK DESIGN | \$71,174 | 1 park underway |
| NORTH STREET VETERANS PARK | \$25,915 | 1 park underway |
| MORSE KELLEY | \$11,000 | 1 park completed |
| DICKERMAN PARK | \$10,000 | 1 park completed |
| QUINCY STREET PARK | \$7,160 | 1 park underway |
| 0 NEW WASHINGTON | \$2,671 | 1 park improved |
| KEMP NUT PARK | \$2,480 | 1 park underway |
| PERRY PARK | \$53 | 1 park improved |
| Total Parks & Open Space | \$256,073 | |

Evaluation of Goals

The City's Parks & Open Space program began to accelerate in PY08 and continues today despite the economic downturn. The City envisions completing 20 parks projects in the 2008-2013 Consolidated Plan.

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

Historic Preservation

The City of Somerville, through the Somerville Historic Preservation Commission, continues to support the preservation of historic neighborhood fabric in the City. The Commission has been working to benefit low and moderate income residents in Somerville through a number of activities. The Commission seeks to upgrade and restore historic assets in Somerville and provide accessibility within historic publicly accessible buildings. The Commission also continues work to nominate more properties for historic designation in the City.

During the 2012 fiscal year, the Commission conducted the following activities:

Historic Preservation Access Study:

The City secured services of an architect to design an accessible entry to the West Somerville branch library. The architect worked with city staff and library stakeholders to identify an ideal route for accessibility and design a new entrance, elevator, and lobby and basement ramp system that would make the entire building accessible. The City is now seeking to use City funds to complete plans for renovation of the library. This design will be incorporated into the complete renovation project. The design is essentially complete, but \$1,440 has been retained in this line item to allow the architect to consult with the designers of the renovation to make sure that the project incorporates the design as intended from this process. The City will seek to complete this renovation in FY14.

Prospect Hill Park & Monument Technical Evaluation:

The City completed an evaluation of the condition of the Prospect Hill Monument, and identified needed physical improvements. A strategy was also developed to resubmit nominating papers to have the Monument and Park designated as a Historic District, making it eligible for state and federal funding. The Monument commemorates the raising of the first American Flag by General George Washington on January 1, 1776 during the siege of Boston. The study report also set the state for a historic interpretive exhibit and park improvements.

Expansion of Local Historic Districts

After designating numerous additional historic properties in FY11, the City did not designate further properties in FY12.

PY11 2011-2012 Historic Preservation Accomplishments

| Project | PY 11 Expenditure | Accomplishments |
|---|--------------------------|------------------------|
| PRESERVATION ACCESS STUDIES (LIBRARY) | \$7,920 | UNDERWAY |
| PROSPECT HILL PARK AND MONUMENT TECHNICAL | \$3,185 | UNDERWAY |
| UNION SQUARE HISTORIC DISTRICT | \$1,404 | UNDERWAY |
| Total Historic Preservation | \$12,509 | |

Evaluation of Goals

The City continues to make strong progress toward achieving its Historic Preservation goals as outlined in the 2008-2013 Consolidated Plan. It has preserved and documented its cultural and natural heritage by preparing Historic Survey forms for the Massachusetts Historical Commission, and participating in plan review teams for new construction and rehabilitation projects. It continues to provide outreach and educational opportunities to low and moderate income residents and the general public by developing narratives for, and hosting, walking and biking tours of neighborhoods and commercial districts. Finally, it supports private preservation

activities by sponsoring its annual Historic Preservation Awards program that honor Somerville residents who have made investments in their homes and businesses.

Historic Preservation: The City tracks performance on its Historic Preservation projects in a number of different ways, depending on the project. These performance measures include: detailed census tracts, and records of each property that is assessed, surveyed, or rehabilitated.

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

Housing Programs

Housing is a major goal in the Five Year Consolidated Plan. In PY11, the City of Somerville made great strides in housing efforts, exceeding our goals in several categories and making significant progress in others. The City of Somerville expended almost \$464,617.44 of HOME and CDBG funds on housing programs and projects and has over \$853,912.60 committed to projects that are in progress. These activities are described in the tables below.

| Program Name | Program Description | Funding |
|--|---|---|
| Housing Development | Provides funding for the development of affordable housing on a case-by-case basis. | <ul style="list-style-type: none"> o \$106,057 in HOME funds expended. |
| <p>Housing Development money helps local developers acquire property, demolish buildings, rehabilitate existing properties and construct new properties for affordable housing throughout the City. Many projects also receive funding from the Somerville Affordable Housing Trust and other state and federal funding resources and private resources. All projects must build housing affordable to households making less than 80% of AMI.</p> | | |
| <ul style="list-style-type: none"> o \$450,000 in HOME Community Housing Development funds were expended for the acquisition of Cross Street Supportive Housing at 75 Cross Street, an 8-unit rental project for formerly homeless low-income households with supportive services in PY10. In PY11, these funds were transferred into a development loan. The property is under construction and is expected to be ready for occupancy in November 2012. o \$80,000 in HOME Special Project funds were expended in PY10 for acquisition for the Jackson Road Group Home at 25-27 Jackson Road sponsored by the Walnut Street Center and developed by Richdale, Inc., for severely disabled adults with capacity for 5 individuals. Construction of the Jackson Road Group Home is complete and the units were fully occupied and reported on in PY11. o \$79,999.40 in HOME funds expended with \$720,000 previously expended and \$53,397.60 remaining committed for the construction and development of the St. Polycarp's Village Apartments Phase 2, a 29-unit rental housing project, at the former site of the St. Polycarp Church property at 16 Butler Drive / 100 Temple Street being developed by the Somerville Community Corporation. The project is fully occupied and is expected to be completed in PY12. o \$1,057.69 in HOME funds expended with \$705,000 remaining committed for the construction and development of the St. Polycarp's Village Apartments Phase 3, a 31-units rental housing project, at the former site of the St. Polycarp Church property at 16 Butler Drive/100 Temple Street being developed by the Somerville Community Corporation. The project is expected to begin construction in November 2012. o \$25,000 in HOME funds expended, with \$220,000 spent in prior years, for the rehabilitation of a 501-unit family rental building located at 1366-1374 Broadway by the Clarendon Hill Somerville Limited Partnership. Construction is complete and all 501 units are occupied. The project created 25 handicap accessible units. | | |

| Program Name | Program Description | Funding |
|--|--|--------------------------|
| Heating System Replacement Program | Provides homeowners a 0% interest deferred payment forgivable loan of up to \$4,500 to replace their inefficient heating system. | \$9,000 in CDBG expended |
| Somerville's aging housing stock means that demand for efficient heating systems is high as well. With increasing energy costs, inadequate heating systems can be a financial burden to a homeowner. The Heating System Replacement Program offers eligible homeowners the opportunity to reduce heating expenses and enjoy a warmer home. | | |
| <ul style="list-style-type: none"> ○ 2 homes received a new heating system | | |

| Program Name | Program Description | Funding |
|---|---|--|
| Housing Rehabilitation Program | Offers a 0% interest deferred payment loan providing up to \$25,000 to low to moderate-income homeowners to make necessary home improvements to their properties. | <ul style="list-style-type: none"> ○ \$253,606 in CDBG expended ○ \$0 in HOME expended ○ \$95,515 in CDBG in progress |
| The majority of Somerville's housing stock was built prior to 1920, which means that a large portion of our housing stock is in need of rehabilitation. This program provides incentives to property owners to improve their properties, while creating or maintaining affordable rental units. Loans can cover a wide range of improvements, interior and exterior, for both single and multi-family properties that may otherwise be prohibitively expensive. | | |
| <ul style="list-style-type: none"> ○ 19 rehab loans provided ○ 17 total units rehabilitated ○ 13 low or moderate-income families assisted ○ 4 elderly households assisted ○ 4 female-headed households assisted ○ 9 rehab loans in progress ○ 5 rental units rent-restricted ○ 11 units brought from substandard into compliance with HQS ○ 2 units brought into compliance with Lead Safety rules | | |

| Program Name | Program Description | Funding |
|--|--|-----------------------------|
| Tenant Based Rental Assistance | Rental assistance provided to assist homeless and at-risk individuals and families | ○ \$80,954 in HOME expended |
| Tenant Based Rental Assistance helps homeless and at-risk individual and families through two different programs. The Wayside Self Sufficiency Housing Program helps formerly homeless young adults in transitional housing to afford their rent, with the ultimate goal of moving into permanent housing. The Prevention and Stabilization Services Program (PASS) helps homeless and at-risk families to move into permanent housing or avoid eviction, by providing rental assistance or security deposits. | | |
| <ul style="list-style-type: none"> ○ 28 low-income households assisted ○ 4 low-income young adults and 6 family households were able to gain permanent housing ○ 10 individuals and 5 families currently receiving assistance ○ 20 female-headed households assisted | | |

| Program Name | Program Description | Funding |
|---|---|-----------------------------|
| Homebuyer Assistance | Closing Cost and Down Payment assistance provided to low-income first-time homebuyers purchasing a home in Somerville | o \$15,000 in HOME expended |
| Closing Cost Assistance in the amount of \$5,000 is provided to First-Time Homebuyers in the form of a 0% interest, 5-year forgivable loan. Down Payment Assistance of up to 15% of the purchase price of the property is provided to First-Time Homebuyers in the form of a 0% interest, deferred payment loan with equity sharing provisions. Any rental units in the properties purchased with Down Payment Assistance must be rented to a low-income family at HOME rents. Buyers can purchase any property in Somerville that meets 203(b) limits and Housing Quality Standards. | | |
| o 3 household received Closing Cost Assistance | | |

| Program Name | Program Description | Funding |
|---|---|---|
| Lead Hazard Abatement Program | Provides 0% interest forgivable loans for owner-occupied properties and 0% deferred payment loans for investor-owned properties to assist in the abatement of lead hazardous materials. | o \$562,661.89 in Lead Hazard Reduction Demonstration Grant expended. |
| Due to the age of Somerville's housing stock, many properties still contain lead paint. According to Massachusetts Law, any unit or single family home must be deleaded if the property has an occupant under the age of six. The Lead Hazard Abatement Program provides an incentive for property owners to comply with lead laws, create and maintain affordable rental housing, and establish a safe living environment for Somerville citizens. | | |
| o 15 loans provided o 29 units abated o 18 low or moderate-income households assisted o 4 loans in progress | | |

| Program Name | Program Description | Funding |
|---|--|------------------------|
| Preservation of Expiring Use Properties | Provides funding for a consultant to work to preserve expiring-use rental properties throughout City | o \$0 in CDBG expended |
| The City of Somerville works with the Somerville Community Corporation to negotiate the preservation of expiring use properties throughout the City. | | |
| o Several existing subsidized properties had Sec. 8 contracts that expired in 2011 and the City worked with the owners towards efforts to sustain the terms of affordability of the housing units. No funds were necessary for this activity. | | |

Other Housing Strategies

Affordable Housing Trust Fund:

The Somerville Affordable Housing Trust Fund (SAHTF), created in 1989, is dedicated to preserving and creating affordable rental and homeownership units in Somerville, in addition to carrying out programs to directly assist homeowners and renters. All of its activities must benefit low and moderate-income households (with incomes at or below 110% of area median income). In PY11, the Trust distributed \$82,300 in Housing Assistance Grants to ten (10) non-profit organizations in Somerville. In addition, the Trust provides a 0% interest, forgivable loans of \$5,000 each through the Closing Cost Program. In PY11, the Trust assisted ten (10) low to

moderate-income households in purchasing their first home through a forgivable loan for a total of \$48,500 expended in PY11 for Closing Cost loans through the Trust. In PY11, the Trust expended \$30,354.78 for the Tenancy Stabilization Program, to assist households at risk of homelessness. The Trust also expended \$250,000 to Somerville Community Corporation toward the development of Saint Polycarp Village Phase II, a 29-unit rental housing project, at the former site of the St. Polycarp Church property at 16 Butler Drive / 100 Temple Street. The Trust also expended \$70,000 to Somerville Community Corporation toward the development of Cross Street Supportive Housing at 75 Cross Street, an 8-unit rental project for formerly homeless low-income households with supportive services.

Inclusionary Housing:

Somerville's Inclusionary Housing Ordinance was established in 1990 to mitigate the impacts of market-rate housing on the supply and cost of low and moderate-income housing, to encourage housing opportunities for a mix of income groups while preventing their displacement and to ensure that housing remains affordable over the long term. Developments seeking special permits with site plan review for eight (8) or more housing units must offer 12.5% of the total units at a price affordable to low or moderate-income households. The City's Housing Division then markets these units to eligible buyers and monitors them to ensure affordability is maintained. In PY08, the Board of Aldermen had adopted a rezoning for the Union Square and Boynton Yards areas that include new zones with higher inclusionary requirements (e.g. TOD-70 and TOD-100 require 15% inclusionary units and TOD-135 require 17.5% inclusionary). In PY11, the City's Inclusionary Housing Program sold a total of three (3) condominiums to low and moderate-income households the units are offered throughout the City of Somerville, located within the market-rate developments and constructed with similar quality, finishes and amenities as the market-rate units. In addition, the City began marketing of 27 affordable rental units and 5 affordable homeownership units in PY11. These units will all be sold or rented to income-eligible households in the upcoming project year.

First-Time Homebuyer Training:

The City of Somerville recognizes the need for education around homeownership by supporting the efforts of the Somerville Community Corporation (SCC) to offer a First-Time Homebuyer Training Course. SCC conducts these classes, which include speakers from the Real Estate, Banking, and Legal Professions. Held several times a year for three to four nights a session, over 25 students attend each session. Graduates receive a Certificate, which allows them access to many housing benefits, such as the opportunity to purchase Inclusionary Housing Units, Down Payment and Closing Cost Assistance, and special mortgage products. The City continues to market the classes through its website, speaks at classes to inform participants of potential opportunities and coordinates with the SCC to connect new graduates with affordable homeownership opportunities.

Homelessness and Continuum of Care:

All local Homeless Providers collaborate through the Somerville Homeless Providers Group and eligible programs coordinate their application to the HUD McKinney Continuum of Care SuperNOFA. The City provides funding for a consultant to organize the application process.

In PY11, the City of Somerville Continuum of Care applied for funding for twenty (20) programs, including one new project which will create new permanent housing at the Washington Street Apartments. All twenty programs were funded at the maximum level as shown below.

Continuum of Care Programs

| Organization | Program | Amount Funded |
|--|--------------------------------------|-----------------------|
| Heading Home | Better Homes 3 | \$131,525.00 |
| Somerville Homeless Coalition | Better Homes 2 | \$407,396.00 |
| Somerville Homeless Coalition | Better Homes | \$163,827.00 |
| Wayside Youth and Family Support Network, Inc. | ShortStop THP | \$235,821.00 |
| Catholic Charities | St. Catherine's Transitional Program | \$50,972.00 |
| Somerville Homeless Coalition | Passages Case Management | \$194,608.00 |
| CASPAR, Inc. | FirstStep Outreach | \$150,793.00 |
| CASPAR, Inc. | Phoenix Center | \$81,498.00 |
| CASPAR, Inc. | GEAR | \$114,450.00 |
| Transition House | Family Development | \$14,073.00 |
| Somerville Homeless Coalition | Passages Expansion | \$40,011.00 |
| CASPAR, Inc. | Phoenix Expansion | \$39,138.00 |
| Somerville Homeless Coalition | Shelter + Care | \$130,548.00 |
| Somerville Homeless Coalition | Sobriety and Stability | \$131,450.00 |
| Somerville Homeless Coalition | Sobriety and Stability II | \$230,889.00 |
| Just a Start | Next Step | \$23,100.00 |
| Heading Home | Somerville Stepping Stones | \$71,678.00 |
| Somerville Homeless Coalition | Home for Good | \$9,275.00 |
| Somerville Community Corp. | Temple/Mystic Apartments | 16,769.00 |
| Somerville Community Corporation | Washington Street Apartments | 176,740.00 |
| | TOTAL | \$2,414,561.00 |

The City and its partners continue to make progress in meeting our goals for reducing and ending homelessness. Through CASPAR's First Step Outreach program, teams reach out to unsheltered homeless persons on the street to assess their needs and direct them to the appropriate care and resources. Based out of the Emergency Shelter Center in Cambridge, FirstStep outreach workers can offer shelter, blankets, food, or referrals for follow-up services.

The Somerville-Arlington Homeless Providers Group meets monthly to discuss issues facing the homeless population. Improvements to the system are suggested and implemented through this framework. In PY 2011, the Volunteers of America joined the SHPG and is in the process of developing a new 22-unit transitional housing project for homeless veterans. These new units will address a gap in the housing for homeless persons in Somerville in the future.

The SHPG has several programs which assist in helping homeless persons transition to permanent housing. In addition, the City has continued to prioritize more permanent housing for homeless individuals and families through the use of HOME funds. The Volunteers of America project at 1323 Broadway will provide 22 transitional and 7 permanent housing units for formerly homeless veterans. Both St. Polycarp's Phase II and Phase III will have 2 units each set aside for formerly homeless households. The City will also continue to prioritize housing stabilization through the Somerville Homeless Coalition and Wayside Youth and Family Services Programs.

The City continues to assist income-eligible individuals and families at risk of homelessness transition to permanent housing through the Prevention and Stabilization Services program. The City also continues to assist homeless young people through the Wayside Youth and Family Support Network ShortStop program. The Somerville Affordable Housing Trust continues to fund an agency to administer the Tenancy Stabilization Program, which can provide short-term assistance for rent arrearages, moving costs, security deposits and past-due utilities to assist tenants in remaining housed. A portion of ESG funds have also been prioritized for households facing homelessness for both prevention and rapid rehousing in accordance with the new ESG guidelines. Improved coordination among agencies serving homeless and at-risk households will also help to ensure that households who can remain housed through vouchers or short-term assistance will be connected with the appropriate services. Strong case management for formerly homeless households will also ensure that households who obtain permanent housing remain there. According to the Somerville Continuum of Care HMIS data, 90% of households in CoC-funded permanent housing beds remained housed after 6 months.

The Somerville Continuum of Care has also implemented a discharge plan to coordinate with the following entities:

- Foster Care: Department of Family and Children
- Health Care: Executive Office of Health and Human Services and Department of Public Health
- Mental Health Care: Department of Mental Health
- Corrections: Department of Corrections

To view a copy of the discharge plan, please contact the City of Somerville Housing Division.

Fair Housing Commission:

The Somerville Fair Housing Commission, created by City ordinance in 1985, is the local fair housing governing body and is comprised of five commissioners. Members must include a City or Housing Authority employee, a representative of a nonprofit community based organization, a local realtor or lender, a low or moderate-income tenant, and a person with substantial civil rights experience.

In PY11, the Fair Housing Commission continued aggressive outreach to Somerville tenants and also began efforts to inform landlords of their rights and responsibilities. The Commission has partnered with the Somerville Lead Hazard Abatement program and has focused efforts on conducting outreach and education around the topic of discrimination against families with children.

Affirmatively Furthering Fair Housing:

The Housing Division has also worked to affirmatively further fair housing during the past program year. An update of the City's Analysis of Impediments to Fair Housing was completed in PY10 and the Fair Housing Commission continues to address the issues identified in it. In PY11, the City went one step further and convened an Analysis of Impediments to Fair Housing Working Group to review the AI and make recommendations for the creation of an Action Plan, which the original plan was lacking.

The Analysis of Impediments to Fair Housing Working Group (AI Working Group) met regularly from Fall 2011 through Spring 2012 to 1) Review the recommendations in the Somerville Analysis of Impediments and make additional recommendations or revisions, 2) Suggest action steps to implement the recommendations, 3) Identify the most impacted population groups for each impediment, 4) Identify entities that will work to address the impediments identified in the

report, and 5) Establish a timeline and recommend ways to document the implementation of the action steps. The AI Working Group met six times and at the end of this process, nine additional impediments to fair housing were identified, for a total of 51 Impediments, in the following categories: Available Land and Current Housing Stock, Housing Cost, Capacity, Ethnicity and Language, Families with Children, Persons with Disabilities, Senior Population, Section 8 voucher Holders, Criminal Record History, and LGBT. 96 specific action steps were recommended to be implemented to overcome the impediments. For easy management, the 96 individual actions steps have been consolidated into 26 broader and related action steps under seven themes of 1) capacity and resources, 2) awareness creation and training, 3) programming, 4) studies, 5) incentives and support, 6) advocacy and 7) policy change.

A final meeting of the AI Working Group was held on September 5, 2012, where the City's Housing Staff presented the Action Plan and final feedback was received. Going forward, the Analysis of Impediments and the Action Plan will serve as the blueprint for the Fair Housing Commission and the Working Group will reconvene every 6 months to check progress and report any changes seen in fair housing access in Somerville. The Housing Division and the Fair Housing Commission will be responsible for documenting the implementation of the suggested action steps. A copy of the plan can be requested by contacting the City's Housing Division.

For the implementation timeline, the broader action steps have been categorized into short term, medium term and long term. The short-term action steps and the City's progress towards implementation of these steps are outlined below. Medium-term and long-term action steps will be addressed in future CAPERs.

Short Term Action Steps

1. Consider revising the requirements for the Fair Housing Commission membership in order to fill vacant positions on the committee.

Progress: Members of the Fair Housing Commission must include a City or Housing Authority employee, a representative of a nonprofit community based organization, a local realtor or lender, a low or moderate income tenant, and a person with substantial civil rights experience, and all members must reside full-time in the City of Somerville. The City has had a hard time retaining the 5 required Fair Housing Commission positions due to the very specific roles each Commissioner must fill. After several years of a strong Commission, several members had to resign when they moved out of the City or retired from their jobs, leaving the Commission with only one active member. Recruitment efforts, in coordinated efforts with the Office of Commissions and direct recruitment, in the past year have resulted in two additional recommendations for appointment, but a potential revision to allow persons who work in Somerville to serve as well is being explored. This must be completed through a revision of the City Ordinance establishing the Fair Housing Commission, and therefore will be discussed in the coming year.

2. Increase collaboration between the Fair Housing Commission and the Office of Somerville Commissions to maximize efforts toward expanding fair housing choices in Somerville.

Progress: The Office of Somerville Commissions provides administrative support to the Commissions for Women, Human Rights, and Multicultural Affairs along with supporting the LGBT community with the City's LGBT Liaison. The Fair Housing Commission has always been placed in the Housing Division for closer coordination with housing specific efforts, but often complaints and concerns regarding Fair Housing overlap with another Commission's mission. Fair Housing Commission staff and the Director of Commissions have implemented

open communication lines to ensure that any issues brought to one Commission's attention are given the full response possible. The Director of Commissions also served on the Analysis of Impediments to Fair Housing Working Group and will continue to serve in that capacity to ensure increased coordination going forward. In the past year, the Director of Commissions held several workshops to educate the public on the role of Commissions and to solicit interest in serving on a City Commission. Fair Housing Commission staff attended these workshops and provided information on participation in the Fair Housing Commission as well.

3. Explore the possibility of finding volunteers and interns, preferably with legal background to investigate fair housing cases and also to provide training to service providers in the city.

Progress: This action step has not yet been implemented, but the Housing Division expects to explore this option in the coming program year.

4. Explore the possibility of finding a graduate intern(s) to assist the Fair Housing Commission to implement identified action steps.

Progress: Several of the impediments identified in the AI concern the fact that the Fair Housing Commission is understaffed and has limited financial and time resources. The current One-Year Action Plan set aside some funds to implement several action steps identified in the AI, including translation of materials and organization of trainings for landlords, realtors and service providers. A graduate student intern has been identified and will begin work to implement these two action steps immediately, as well as explore other areas in which Fair Housing education and outreach can be improved over the coming year.

5. Partner with Fair Housing Center of Greater Boston to utilize the personnel and resources in the areas of outreach, education and training.

Progress: The Fair Housing Center of Greater Boston was contacted prior to launching the Analysis of Impediments to Fair Housing Working Group to gain some insight and expertise and Fair Housing staff met with the Center's Director as a jumping off point for the Working Group's efforts. While they were unable to serve on the Working Group as it progressed due to staff turnover, the City plans to reach out to them in the coming year to coordinate trainings and will continue to refer complaints and concerns to them for testing and assistance.

6. Provide fair housing training for service providers in the city to enable them to provide fair housing advice to residents who patronize their services.

Progress: While no trainings were provided in this program year, the graduate student intern identified in Action Step 4 above will work to organize several trainings in coordination with Fair Housing Month in April this year.

7. Conduct a Housing Needs Assessment to understand the housing needs in the city and also to provide recommendations on how to address the issues identified.

Progress: A graduate student intern was hired by the City over the summer of 2012 to conduct a Housing Needs Assessment for Somerville. This work was completed in October 2012 and will provide a basis for the work of the Housing Division going forward. A copy of the Needs Assessment can be requested from the Housing Division.

8. Develop a comprehensive fair housing education and outreach plan, which will guide the Fair Housing Commission's future educational outreach to various impacted population groups through appropriate channels and venues.

Progress: Not yet begun. The graduate intern and the Fair Housing Commission will work towards this step in the coming year.

9. Promote the City's housing programs and other non-city housing programs as fair housing resources.

Progress: Staff to the Fair Housing Commission attends many outreach activities throughout the year to increase awareness of the City's housing programs, including first-time homebuyer education classes, Senior Working Group meetings, public health group meetings, ResiStat meetings and early childhood education meetings. The Lead Hazard Abatement Program in particular addresses a major impediment to fair housing facing families with children and the City promotes this program via direct mailing to all Somerville property owners with information on their responsibilities in regards to lead paint as well as information on the resources available to address this barrier through abatement.

10. Increase outreach on the existing housing programs to homeowners and tenants.

Progress: See above answer to Action Step 9. The Housing Division will continue to promote its programs in the coming year, taking more full advantage of new media such as Facebook and Twitter, as well as continuing direct mailings to likely eligible households.

11. Work to increase coordination among the City, Somerville Housing Authority, Somerville Community Corporation, and other affordable housing developers to maximize their available resources devoted toward affordable housing development.

Progress: The City's Housing Director is in constant contact with the Somerville Housing Authority and Somerville Community Corporation, as well as other housing developers, to ensure that developments built are addressing the real needs of the City's population, including provision of housing for specific populations most affected by barriers to fair housing. In the past year, Somerville has seen the following developments move forward:

- St. Polycarp's Phase 2: a 29-unit affordable rental housing project, at the former site of the St. Polycarp Church property at 16 Butler Drive / 100 Temple Street being developed by the Somerville Community Corporation. This project included 2 units for persons with mobility impairments and 1 unit for persons with sensory impairment. It also included 2 units for chronically homeless individuals. This project was completed and fully occupied during PY11.
- St. Polycarp's Phase 3: a 31-units rental housing project, at the former site of the St. Polycarp Church property at 16 Butler Drive/100 Temple Street being developed by the Somerville Community Corporation. This project is expected to begin construction by the end of November 2012 and be ready for occupancy by the end of 2013.
- Cross Street: an 8-unit rental project for formerly homeless low-income households with supportive services. This project was completed and began occupancy in October 2012.
- Jackson Road Group Home: a group home built at 25-27 Jackson Road sponsored by the Walnut Street Center and developed by Richdale, Inc., for severely disabled adults

with capacity for 5 individuals. This project was completed and units were occupied in PY11.

- Massachusetts Bay Veterans' Center: a development with 22 transitional units and 7 permanent units for formerly homeless veterans at 1323 Broadway developed by the Volunteers of America. The project closed in October 2012 and will be complete and ready for occupancy in the summer of 2013.
- SHA WaterWorks: a 60-unit Senior Housing Development being proposed by the Somerville Housing Authority in the former MWRA WaterWorks building. Preliminary discussions on this project are in progress.
- 181 Washington Street: a 40-unit affordable rental project on the site of the former Boys and Girls Club being developed by the Somerville Community Corporation. Preliminary discussions on this project are in progress.

In addition, the Housing Division and the Somerville Affordable Housing Trust fund have created and implemented a Housing Development Project Application in order to ensure that new affordable housing development proposals align with both the HUD 5-Year Consolidated Plan and the City's 20-Year Comprehensive Plan, SomerVision.

12. Review the current zoning code and building code to allow development of more affordable housing units in the city.

Progress: In April 2012, the City adopted a new Comprehensive Plan for the City, called SomerVision. The SomerVision plan includes six key implementation steps. One of those steps involves the overhaul of the Somerville Zoning Ordinance to bring it in-line with SomerVision goals for station-area development as well as neighborhood conservation. Part of these discussions includes how housing, and affordable housing, should be incorporated throughout the City in all zones

Launched in the fall of 2012, the Somerville by Design initiative is funded in part by a grant from the federal Department of Housing and Urban Development's Sustainable Communities program. As part of this grant, the Planning Division has hired a Senior Planner to review and revise the Somerville Zoning Ordinance. This work has begun and will continue through December 2013.

Tenant-Landlord Rights and Responsibilities:

In addition to staffing the Fair Housing Commission, the Housing Division provides information on basic tenant and landlord questions. The Housing Division website has been updated to include frequently asked questions, online resources and other information. "The Tenant's Helper: A Handbook for Renters" was updated in PY07 and is available online as well. In addition, both tenants and landlords can call directly to the Housing Division with questions and speak to a staff. Estimate of 20 calls are received each week with referrals given to appropriate agencies to aid the parties in resolving issues and concerns. Through the Somerville Homeless Providers Group and the Somerville Affordable Housing Trust Fund, the City has also developed relationships with local non-profits to provide tenant-landlord mediation. The Somerville Community Corporation and the Community Action Agency of Somerville provide eviction prevention and mediation, and Cambridge and Somerville Legal Services provides legal aid to eligible callers as well as referrals to the Fair Housing Center of Greater Boston.

Emphasis on Outreach/Communications:

The City of Somerville's website and email system has become a large asset to the Housing Division and its ability to conduct business in the past year. The Housing Division's website has

been ranked #2 in a city wide user survey conducted by Somerstat for user friendliness and usability. Residents can find applications for all housing programs, frequently asked questions for each program, outside resource links, agendas and minutes for Fair Housing Commission and Trust meetings, emergency shelter services, and Inclusionary Housing opportunities. Additional changes to the website include translation services, feedback opportunities, housing services for special needs groups and posted reports and studies relevant to housing in Somerville. All of these changes serve to increase the number of people who are able to access housing programs.

Recovery Act Funds

The City has completed three (3) housing projects in 2011-2012 using American Recovery and Reinvestment Act (ARRA) funds.

| Street Address | 2011-2012 Expenditures | Status |
|-----------------------|-------------------------------|---------------|
| 8 Mountain Avenue | 11,545 | COMPLETED |
| 61 Albion Street | 20,000 | COMPLETED |
| 11 Sewall Street | 30,000 | COMPLETED |
| TOTAL | 61,545 | |

Evaluation of Goals

The City's Five Year Consolidated Plan for 2008-2013, covering the period from April 1, 2008 through March 31, 2013, established a basic goal of creating, preserving or rehabilitating 406 units of housing for low and moderate-income households. This five-year goal includes the following objectives:

- Create new affordable housing
- Preserving existing affordable rental units
- Create housing for the chronically homeless
- Avoid poverty concentration through housing development
- Increase homeownership
- Prevent foreclosure
- Rehabilitate housing stock

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

Public Service Grant Accomplishments

Healey Club Boy and Girls Club:

An enrichment after-school program was designed for low income youth ages 6 through 13 to provide educational programs, social activities and self-improvement resources, parental involvement and incentives. Ninety five youth participated in this after-school program, nearly 90% were from very low income families. This program shares the City's goal of providing children with the best opportunities to live healthy and productive lives by focusing on academic success, healthy lifestyles and good character development. Youth from the Healey community, who have the least, but need the most, receive the guidance and essential tools needed for a successful and bring future and were afforded the opportunities to be normal kids challenged to do extraordinary things.

Health Advisory Somerville Hospital:

Fourteen low income high school teens were trained weekly under the guidance of a Health Educator to act as peer educators and advocates by developing health campaigns and interactive exhibits to raise teens' awareness of health issues. The teen Health Advisory addresses the 5 Year Plan by demonstrating success in building youth leaders and promoting civic engagement, community service and academic focus among the members. Participation in this program offered youth an avenue to act as leaders in the promotion of health and wellness and members became catalysts for change in their community.

Substance Abuse CASPAR:

Community-based support services were provided to 132 newly sober clients to help bridge the gap to long term sobriety, reduce relapse and provide appropriate levels of care for clients. The City's 5 Year Goals were addressed through the provision of education, support services and other tools to prevent and address homelessness. Additionally, CASPAR worked with low income seniors and people with disabilities associated with living on the streets.

Green Team Groundwork Somerville:

Eight teens were hired for a summer, job readiness program promoting urban agriculture and healthy eating and supporting Shape-Up Somerville efforts. Youth learned to make healthy choices in their own lives, lead a more active lifestyle and gained meaningful employment. This program worked toward the City's 5 Year goals of providing education and leadership opportunities for youth by hiring youth to be stewards of the land, learn to care for a garden, develop entrepreneurial skills, job training and conservation techniques

Early Intervention Riverside/Guidance Ctr:

CDBG funds provided early intervention services for 80 low income infants with developmental delays between 0-36 months. The agency stressed prevention and therapeutic intervention in home visits to maximize access and encourage independence. The program addressed the 5 Year Plan by connecting families to community services to help them meet their daily needs and reduce isolation. Families also learn their rights and responsibilities with regard to specialized services for their children.

ESOL Classes Haitian Coalition:

Two levels of conversational ESOL classes were taught at Clarendon Hill Public Development to enable 71 participants to enhance communication skills, get better jobs, advocate for themselves and their families and become civically active residents. This program addressed the 5 Year Plan by enabling residents to increase opportunities for success and transition to

self-sufficiency through various classes, professional development, job search and information on health services

Mentor Aftercare Just-a-Start:

CDBG funded one of two volunteer mentors' trainings to support low income teen mothers ages 13 to 21 and equip the youth mothers with the knowledge and life skills necessary for independent living. Fourteen mentors developed a relationship of trust and provided the young mothers with positive role models to build a safe and nurturing living environment for themselves and their children. This program addressed the 5 Year Plan by providing teen mothers and their children with a support network and the skills to build a healthy and productive environment. Mentors improved education, support services and the tools to prevent and address homelessness.

Social Services MAPS Portuguese:

CDBG funded a case manager who culturally and linguistically competent assistance to 83 Portuguese speakers in areas ranging from job and housing searches to help obtaining basic services and government benefits. This program address the 5 Year Plan by providing opportunities for residents to improve their situation through referrals and assistance with program applications; by providing Immigrant Social Services a comprehensive program to meet clients' basic needs and by providing services to support elderly and persons with disabilities. The services provided enabled resident to improve employment opportunities, reduced barriers, provided culturally appropriate avenues for linguistic minorities to access necessary services and provided services for low-income seniors living on fixed incomes.

24 Hour Crisis Hotline Respond:

CDBG funded evening hotline advocates providing crisis intervention, information and counseling over the phone to individuals seeking domestic violence support services, referral and/or information and assistance with safety net planning, securing shelter space, and support and connecting with legal, medical and other essential social services. Three thousand four hundred callers were assisted. The City's 5 Year Plan are closely tied to Respond's mission and services to assist fleeing families meet their immediate needs for safety and basic care (shelter, food, clothing, medical care) and then to provide information and resources to address barriers to long-term safety which include their ability to meet basic needs (housing, healthcare, legal assistance, childcare, education and access to public assistance). Domestic Violence is one of the major causes of homelessness for women and families. Respond works to prevent homelessness by providing survivors with options for safety and stability to enable them to rebuild their lives and become self-sufficient.

Empower Youth Mystic Learning Center:

CDBG funded an enrichment youth education program, a job-readiness/peer leadership program and a parental involvement and grounding in the community. Low income young adults received job readiness training and obtained peer leadership training while providing younger children with enrichment and educational activities in an after-school program at the Mystic Public Development. Parents of younger children were involved in the delivery of programs and services, i.e. involvement in the Board, volunteer capacity, etc. One hundred young adults, children and parents were involved in the program. Eighty-three low income children and youth were involved in the program. The agency's goals aligned with the City's 5 Year Plan by empowering youth to set goals for the future, to develop healthy lifestyles and to become agents of change in the community.

Elderly Transportation SCM:

CDBG funds provided fully accessible transportation for seniors and persons with disabilities for medical visits and grocery shopping. This door to door service promoted the independence of 366 seniors and disabled residents by providing community-based transportation to help residents maintain healthy mobile and connected lives. The agency's goals addressed the City's 5 Year Plan by providing critically needed transportation services for seniors and for persons with disabilities.

School Mediation Somerville Community Corp:

CDBG funds were used provide low and moderate income High School youth with leadership and mediation skills' training to resolve conflicts. Youth lead workshops on conflict resolution skills, anti-bullying techniques and ways to resist peer pressure around gang recruitment. Youth were taught anger management and empathy and the ability to understand the other's point of view. Three hundred and sixty-six youth were impacted by this program. This program addresses the City's 5 Year Plan by providing education and leadership opportunities for youth to become agents of change and resolve conflicts and provide intervention and prevention services for their peers and by providing leadership training and empowering youth to be role models and peacemakers in the community

Better Homes Somerville Homeless Coalition:

CDBG funds were used to provide permanent supported housing services to formerly homeless individuals and families. Better Homes is based on the federal government's housing first-model. Thirteen individuals were served. The City's 5 Year Plan was addressed by offering affordable housing, critical resources and services to low-income individuals and families who were having difficulty meeting their most basic needs. Permanent housing is the foundation from which children within Better Homes can have the best opportunities to live healthy and productive lives and stay in school. Better Homes addresses the needs of the disabled since all of the head of households involved in the program are disabled.

Project SOUP Somerville Homeless Coalition:

CDBG funds were used to support two food pantries offering low income families and individuals 3 days worth of nutritious food each month. Additionally, the program offered a meal once a week and an opportunity for participants to socialize. Over 1,665 individuals received assistance. As people continue to lose their jobs and are unable to find sustainable employment, there has been an increase in the frequency of visits to the pantry. This program addressed the City's 5 Year Plan by providing food and information of other food resources to low income residents.

Volunteer/Resource Center Somerville Homeless Coalition:

The resource center provided an extensive amount of valuable information and referral support for homeless and low-income residents – 24 hours a day. The center fielded 3,000 requests for information and referral many of the calls were for prevention help as a result of the economic downturn. The volunteer program coordinated and directed volunteer activities to serve residents and nonprofit agencies. The program coordinated 900 volunteers including families, students, faith-based groups, local business employees and associations. This program addressed the City's 5 Year Plan by providing an emergency safety net pf critical outreach, comprehensive case management, referral and a host of information and services to homeless, near-homeless and low-income adults, parents, children, elderly and disabled persons having difficulty meeting their most basic needs. This program increased healthy opportunities for

children and moving families into supported affordable housing has prevented family homelessness.

Outreach Program YMCA:

CDBG funded YMCA behavioral contracts and adolescent counseling for low income at-risk youth ages 10-17 by using high risk activities to reward youth for behavioral stability. Twenty-four youth participated and improved in school and at home. This program addressed the City's 5 Year Plan by supporting and strengthening families, developing leadership in youth and promoting self-esteem and a healthy approach to life.

CIT/LIT Summer Jobs YMCA:

CDBG funding enabled 45 low income youth (ages 13- 15) to complete a one month job readiness training that included team building and leadership development, as well as, hands on training for future employment in a summer camp program and/or other youth appropriate job opportunity. This program addressed the City's 5 Year Plan by providing employment skills and increasing opportunities for youth along with leadership training and promoting mentoring skills.

Youth Organizing Teen Empowerment:

CDBG funds provided leadership training for low income youth ages 13 to 21 to become agents for change in the community. Youth identified initiatives and used an analytical process to determine priority issues facing the community and worked to improve their community, i.e. initiatives were designed to decrease negative behaviors, increase positive engagement in community and schools and motivate youth to excel in vocational and academic areas. Twenty-four low income youth were involved in the leadership training. This program addresses the City's 5 Year Plan by engaging youth in working toward a safer, healthier and more productive city, helping to avert violence, substance abuse, criminal activity and other dysfunctional behaviors among youth.

Kent Street Transition House:

CDBG funds supported case management, individual and group services and workshops for formerly homeless residents now living at Kent Street. Over seventy individuals participated in supportive services. This program reflects the City's 5 Year Plan by providing formerly homeless and traumatized low-income people safer healthier lives and strategies for economic stability and homelessness prevention.

Junior Peer Leadership Wayside Youth:

CDBG funded a 6 week training in violence and gang prevention for youth (ages 8-11) living in Clarendon Hill Public Development were recruited and trained in violence and gang prevention strategies, positive communication techniques and leadership skills. Twelve youth developed and presented anti-violence presentations to peers and adults. The program reflects the City's 5 Year Plan by empowering youth to engage in the community using their leadership and mentoring skills to bring positive prevention messages.

Step Up to Education Welcome Project:

CDBG funds were used to support youth and adults from immigrant families at Mystic Housing Development to improve outcomes for youth in school and to better coordinate and align services for a positive impact. ESOL classes were offered to 160 non-English speakers, 16 bi-lingual youth provided interpretation assistance at meetings and gained knowledge on issues to discuss with their families and social networks and immigrant parents built leadership through

participation in the PTA. This program reflected the City's 5 Year Plan by strengthening the engagement of immigrant families in the academic success of their youth and integration in the community.

Public Art Arts Council:

CDBG funds assisted the design and implementation of two summer arts programs. One for youth ages 6 through 12 encouraging the exploration of art, nature and imagination at the Community Growing Center (50 youth participated). A second, a summer job program, was designed for youth ages 14-21 integrating environmental science and art with hands-on learning about the Mystic River watershed and creating panels for the mural installation on I-93/Mystic Avenue. Seven youth participated in the job program. Both programs addressed the City's 5 Year Plan by providing children with the best opportunities to live healthy productive lives and by providing education and leadership opportunities for youth to become involved in the community. Art in the Garden provided affordable day care services for families. The Mystic River project promoted mentoring and employment skills and developed leadership for youth to become agents of change.

SPF100 Somerville Cares about Prevention Health Department:

CDBG funds were used to train Somerville Positive Forces (SPF) youth in innovative strategies to prevent and reduce Alcohol, Tobacco and other Drug (ATOD) use in Somerville. A survey of area youth was conducted, analyzed and strategies were formulated. One hundred and eight youth participated. The program aligned with the City's 5 Year Plan by providing leadership opportunities and training for youth as agents of change in the area of substance abuse prevention.

Health and Wellness Council on Aging:

CDBG funds were used to expand recreational, educational and health and wellness programming at 3 Senior Centers. Direct social services were provided to at-risk elders. All services were developed to enable seniors to remain in their homes and maintain safe and healthy lives. Drop-in programming engaged 394 seniors. This program addressed the City's 5 Year Plan by providing comprehensive programming for seniors and disabled residents to reduce isolation and create community.

Evaluation of Goals

Requests for Proposals were advertised in April 2011 for the July 2011 contract year. Responders were asked to identify how their proposed program would address the City's 5 Year Consolidated Plan. Sub-recipients were awarded contracts with the Scope of Service outlining the goals of the contract, the number of clients to be served with the budget and the timeline for goal achievement. Invoices with back-up documentation were received monthly or quarterly and were reviewed against contract terms. Public Service sub-recipients reported quarterly on their progress toward the goals in their Scope of Service and monitoring visits were scheduled as needed. OSPCD was responsible for both the financial and program monitoring of sub-recipients activities to provide reasonable assurance that the sub-recipients administer the federal award in compliance with federal requirements; for ensuring required audits are performed and requiring sub-recipients to take prompt corrective action on any audit finding; and for evaluating the impact of sub-recipient activities on their ability to comply with applicable federal regulations.

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

Public Service activities from July 2011 through June 2012 primarily addressed the City's goals to create opportunities for residents to improve their economic, social and political situation; to provide services for low income children; to create educational and leadership opportunities for youth; to address the needs of low income families and to provide services for elderly residents and persons with disabilities. Somerville is fortunate to have a history of collaboration among social service agencies to grow and exchange information to best serve the City's residents and reduce duplication of services. This collaboration was evident as nine social service organizations, working with low income children and youth, participated in the SomerPromise Challenge enabling children and youth to thrive and succeed. The agencies met monthly to set goals, make plans for the coordination and integration of services and to share progress being made on those plans and goals. The agencies were divided into four groups: Early Childhood, Academic Achievement (K-8), Family and Community Engagement and Health Care. Creative sharing of resources has enabled organizations to leverage additional funds to meet the needs and address the problems of the residents of Somerville.

HUD regulations allow the commitment of up to 15 percent of our CDBG allocation for public service activities. In FY11, 15 percent of CDBG funds were committed and the funds were expended by several social service agencies for direct services to assist low income residents with educational opportunities and strategies to improve their living situation; expand development options for children and youth and increase access and understanding of services for at-risk residents and elders. Client data was collected on 4,635 residents that gathered income and ethnicity data. The results of the data show that 61% of the clients served were extremely low income, 31% were low income, and 8% were moderate income. The table below summarizes the data collected.

| Demographic | Number of Clients |
|--------------------------------|--------------------------|
| White | 2,621 |
| Black/African American | 1,084 |
| Asian | 165 |
| American Indian | 2 |
| Black/African American & White | 18 |
| Other | 745 |
| SubTotal | 4,635 |
| Income Profile | Number of Clients |
| Extremely Low Income | 2,823 (61%) |
| Low Income | 1,450 (31%) |
| Moderate Income | 362 (8%) |
| SubTotal | 4,635 |

In FY11, the program was able to fund 27 public service programs to support job readiness programs, to improve economic opportunities through education, ESOL classes for linguistic minorities and affordable child care for working families; mentoring and leadership training for youth; advocacy services for low income residents, linguistic minorities and substance abusers; transportation services for elders and disabled residents allowing them to remain independent. Creative sharing of resources has enabled organizations to leverage additional funds to meet the needs and address the problems of the residents of Somerville.

Emergency Solutions Grant and Recovery Act Accomplishments

ESG CASPAR 24 Hour Services for Active Substance Abuser

CASPAR's FirstStep Street Outreach team engaged with homeless men and women who were active substance abusers, who have lost housing, family and social supports. CASPAR accepted referrals from the Cambridge, Somerville, Harvard, MIT and MBTA police departments. Nine hundred seventy-nine primary clients were served and two hundred and one secondary clients participated in ACCESS Transitional program for further treatment and/or sober living. Clients were provided emergency lifesaving services 24 hours a day to include case management, medical, mental health and substance abuse services and were encouraged to come to the (110 bed) shelter. CASPAR addressed two of the City's goals (4) to provide comprehensive programs for low-income residents by providing front-line life saving services to unsheltered homeless men and women and by providing an assessment of their immediate and long range needs. Through goal (5), CASPAR provided the support and the referrals to promote recovery and end homelessness. ACCESS offered essential linkage to treatment programs within CASPAR's continuum of care.

ESG Catholic Charities Emergency Outreach

Catholic Charities provided emergency outreach to 220 women, the majority of whom have mental health issues. Vans reach out to sober, homeless women in Somerville and Cambridge, providing them with emergency essential services, case management and encouraged them to access the safe shelter. ESG funding was used for the increase cost of fuel, food and program supplies Catholic Charities addressed the City's Goals by engaging women and offering a safe alternative to the streets, by increasing essential services offered and by providing support services to help people reach independent living. At all levels of programming at Catholic Charities, women were offered services and referrals to help them move beyond homelessness consistent with the 5 Year Plan.

ESG Respond Shelter Operation and Essential Services for Battered Women & their Families

Respond provided a safe, confidential shelter for 82 individuals including providing emergency shelter, advocacy and support services for survivors of domestic violence and their children who sought refuge from domestic violence is one of the root causes of homelessness for women and families. Respond addresses the City's 5 Year Plan by providing survivors with options for safety and stability, lives were rebuilt and survivors became self-sufficient. Shelter advocates provided housing advocacy, helped participants to access housing stabilization funds and/or apply for public housing, public assistance and job search services. Respond worked to meet the needs of the most vulnerable survivors and families – those isolated due to psychological and/or financial abuse, lack of English proficiency, immigration status, lack of income and lack of support networks as a result of domestic violence. Respond sought to enhance the skills and abilities of its clients by providing comprehensive children's services, childcare and parenting groups and offering access to bicultural and bilingual advocates to accommodate the immigrant population facing added cultural barriers to accessing services.

ESG Somerville Homeless Coalition Family and Individual Shelters

The agency operated two shelters and housed 129 people, including 42 children. The family shelter met the critical needs of 23 families with 42 children. The individual shelter assisted 54 individuals. Both shelters provided critical social services including: one-on-one case management; comprehensive housing search, referrals to mainstream resources and placement assistance; assistance with public benefit applications; budgeting and financial literacy and extensive referrals for employment search and training, healthcare, health

insurance, legal services, substance abuse groups, education, mental health services and child care, among others. The shelters provided clothing, toiletries, free laundry facilities, intense staff support and food to address nutritional needs of all clients – particularly, children. ESG funds were used to defray shelter operation expenses to include shelter rent, utility expenses, shelter furnishings, repair and maintenance, shelter food and supplies, etc. The shelter programs directly addressed the goals within the 5 Year Plan by providing critical services to the City's homeless population. Both shelters served heterogeneous populations, including those within the immigrant community, as well as, seniors, disabled persons, a diversity of races and ethnicities, victims of domestic violence and many other clients with varying demographic characteristics. The shelter programs offered opportunities for households to improve their economic and social situations by offering children the change to live healthy and productive lives despite their homeless situation and meeting everyone's most basic needs.

ESG Transition House Kent St Support

Essential services of at least one kind were accessed by 40 households (73 formerly homeless residents) living at Kent Street Apartments. Case management services and community workshops enabled residents to build skills and social support to solve problems. Clients accessed the food bank, participated in individual and group support discussions, attended monthly social gatherings and an art therapist worked with youth twice a week. The services met the City's Goals by preventing homelessness by providing comprehensive case management that empowered residents to become self-sufficient and retain their current residencies and not return to homelessness and providing housing and support services to disabled residents (approximately 60% of households) who were formerly homeless but are not able to retain permanent housing.

Recovery Act Funds

Five sub-recipients were awarded HPRP funds to be expended over three years. Four agencies provided Financial Assistance for rental arrearages, security deposits, utility arrearages, moving and storage expenses, etc. Case manager's salary and fringe benefits were charged to Relocation and Stabilization services. Case managers from all five agencies worked to assess the families/client's needs, strengths and weaknesses. Case managers worked with the client/family on the barriers to getting them housed, helping them find appropriate housing and continued to work with the client/family to be certain that they had the ability and means to stay stable. Case managers evaluated and documented the client's eligibility every 3 months. In most cases, case managers were bi-lingual and bi-cultural. The majority of the funds were expended in the first two years of the program. As funds are dwindling, the HPRP Consortium of 5 sub-recipients has been working closely to ensure that the program closes out smoothly. The Homeless Providers Group, made up of the Consortium and other providers, met monthly to discuss a wide range of housing and benefits related changes.

Through the Homeless Assistance program numerous clients who had been homeless for years have moved into apartments.

HPRP clients participated in financial management classes to provide them with financial knowledge and skills to help them become better decision makers and learn to prioritize their financial responsibilities. The classes focused on financial responsibility and accountability to prevent a cycle of future homelessness. HPRP funds changed client's lives for the better and gave them the temporary boost they needed.

HPRP funds have enabled sub-recipients to increase the quality and quality of social services offered beyond just providing emergency assistance. Eligible clients have worked with case managers to address not only their housing stability but the root cause of that instability.

Detailed legal advice was given to tenants and cases were litigated successfully helping to prevent homelessness and inform local judiciary and landlords about tenants' rights. Legal negotiations with landlords were initiated resulting in the prevention of homelessness to delay tenancy interruption or because the tenant has more time to find other housing with rapid re-housing assistance.

All clients identified and eligible for HPRP services received case management at a minimum. Comprehensive case management was the foundation upon which the housing advocates created a stabilization plan for eligible clients. For most clients this stabilization plan included a myriad of services to preserve and/or remain housed and to exit homelessness (i.e. rental assistance, affordable housing search and placement, utility payments, legal services, etc.).

HPRP Com. Action Agency of Somerville Homeless Prevention

Agency provided eviction prevention and rental assistance to eligible clients. A case manager worked with new and continuing clients on case management and housing stabilization issues in the courts, with the Somerville Housing Authority, with the Board of Health on behalf of 38 households comprised of 105 individuals. In collaboration with the Health Foundation, CAAS presented at the Som. Bed Bug Summit attended by 60 landlords, exterminators, providers, City representative, Housing Authority, etc. All contributed ideas working together to address the threat to homes, belongings and family health.

HPRP Greater Boston Legal Services (GBLS) Eviction Prevention

GBLS's goal was to serve 40-60 Somerville households (families and individuals). To date they have served 64 households (146 persons) thus meeting their goal by providing eviction prevention counseling and representation. Staff was trained in the handling of appeals related to denial of affordable housing. .

HPRP Som. Community Corp (SCC) Homeless Prevention

SCC has been successful working to achieve its contractual goals to serve 160 clients and re-house 40 clients. Despite the tough cases, they have made progress with landlords making affordable agreements for clients' to pay back rent. Very low income and some cases of mental illness cause obstacles for clients' success. Eighty-six clients were assisted this year along with continuing clients. Eligible clients were assisted with securing their current or new permanent housing to avoid homelessness. , clients have been provided advocacy, mediation, budget counseling and financial assistance.

HPRP Somerville Homeless Coalition Homeless Prevention

Six eligible clients received rental assistance under the HPRP program bringing the total to 45, exceeding the contractual goal by over 60%. They met with the case manager on a weekly basis, they explored housing options and applied for affordable (subsidized) housing, they were assisted with monthly budgeting and if they were not working or in need of better employment, they were referred to job search or job training programs.

HPRP Somerville Mental Health Homeless Prevention

There were no expenditures this year. All funds were expended last year. Last year, fifteen at-risk eligible clients with mental illness have received financial assistance, tenant/landlord

mediation assistance and monthly budgeting to remain stably housed. The case manger met with the clients weekly to assess their service plan.

| | Prior year's projects carried forward | Expended Jul 2011- Jun 2012 | program yr | Balances remaining | Accomplishments |
|----|--|--|-----------------------|-------------------------------|---|
| PS | COUNCL ON AGING- WELLNESS PROGRAM | \$21,957.84 | 2010 | \$10,893.40 | 394 seniors served |
| PS | SOM HOMELESS COALITION SOUP PANTRY 1 DAVIS SQUARE, SOMERVILLE | \$835.00 | 2010 | \$0.00 | 1,665 individuals served |
| | | \$22,972.84 | | | |
| | Projects funded this year | Expended Jul 2011- Jun 2012 | program yr | Balance remaining | Accomplishments |
| PS | HEALEY CLUB BOYS & GIRLS CLUB 5 MEACHAM ST, SOMERVILLE | \$9,235.00 | 2011 | \$0.00 | 95 youth served |
| PS | SUBSTANCE SUPPORT CASPAR 5 MIDDLESEX AVE, SOMERVILLE | \$5,000.00 | 2011 | \$0.00 | 132 people served |
| PS | HLTH ADVISORY SOM HOSPITAL 91 HIGHLAND AVE, SOMERVILLE | \$3,000.00 | 2011 | \$0.00 | 14 teens trained |
| PS | YTH ORGANIZING TN EMPOWERMT 165 BROADWAY, SOMERVILLE | \$76,665.19 | 2011 | \$0.00 | 24 low income youth enrolled |
| PS | INF/TODDLER ELIZ PEABODY HSE 277 BROADWAY, SOMERVILLE | \$9,020.00 | 2011 | \$0.00 | 22 children served |
| PS | GREEN TEAM GROUNDWORK SOM 21 PROPERZI WAY, SOMERVILLE | \$4,500.00 | 2011 | \$0.00 | 8 teen jobs created |
| PS | EARLY INTERVENTION GUIDANCE CTR 61 MEDFORD ST, SOMERVILLE | \$4,500.00 | 2011 | \$0.00 | 80 low income infants served |
| PS | ESOL CLASSES HAITIAN COALITION 268R POWDERSHOUSE BLVD, SOMERVILLE | \$9,020.00 | 2011 | \$0.00 | 71 low income participants |
| PS | MENTOR AFTERCARE JUST-A-START 114 TEMPLE STREET, SOMERVILLE | \$4,250.00 | 2011 | \$0.00 | funded fourteen mentors |
| PS | SOCIAL SVCS MAPS PORTUGUESE 1046 CAMBRIDGE ST, CAMBRIDGE | \$5,190.00 | 2011 | \$0.00 | 83 low income Portuguese speakers served |
| PS | EMPOWER YOUTH MYSTIC LEARNING 530 MYSTIC AVE, SOMERVILLE | \$16,240.00 | 2011 | \$0.00 | 83 low income youth enrolled |
| PS | 24 HR HOTLINE RESPOND PO 555, SOMERVILLE | \$18,540.00 | 2011 | \$0.00 | 232 women reached |
| PS | ELDERLY TRANSPORTATION SCM 167 HOLLAND ST, SOMERVILLE | \$65,850.00 | 2011 | \$0.00 | 366 seniors served |
| PS | SCHL MEDIATION SOM COM CORP 91 HIGHLAND AVE, SOMERVILLE | \$9,020.00 | 2011 | \$0.00 | 366 youth served |
| PS | BETTER HOM SOM HOMELESS COAL 1 DAVIS SQUARE, SOMERVILLE | \$7,045.00 | 2011 | \$0.00 | 13 individuals served |
| PS | PROJ SOUP SOM HOMELESS COAL 15 FRANKLIN STREET, SOMERVILLE | \$63,387.10 | 2011 | \$0.00 | 1,665 individuals served |
| PS | VOL/RES CTR SOM HOMELESS COAL 1 DAVIS SQUARE, SOMERVILLE | \$8,570.00 | 2011 | \$0.00 | 3,000 calls answered |
| PS | OUTREACH PROGRAM YMCA 101 HIGHLAND AVE, SOMERVILLE | \$6,525.00 | 2011 | \$0.00 | 24 youth enrolled |
| PS | CIT/LIT SUMMER JOBS YMCA 101 HIGHLAND AVE, SOMERVILLE | \$22,550.00 | 2011 | \$0.00 | 45 low income youth trained |
| PS | KENT ST TRANSITION HOUSE 32 KENT STREET, SOMERVILLE | \$4,750.00 | 2011 | \$0.00 | 70 individuals received services |
| PS | JR LEADERSHIP WAYSIDE YOUTH 268 POWDERHOUSE BLVD, SOMERVILLE | \$4,000.00 | 2011 | \$0.00 | 12 youth received training |

| | Projects funded this year | Expended Jul 2011- Jun 2012 | program yr | Balance remaining | Accomplishments |
|-----|---|--|-----------------------|------------------------------|--|
| PS | STEP UP ED WELCOME PROJECT 530 MYSTIC AVE, SOMERVILLE | \$8,120.00 | 2011 | \$0.00 | 160 immigrant non English speakers trained |
| PS | PUBLIC ART ARTS DEPARTMENT 50 EVERGREEN AVE, SOMERVILLE | \$8,840.00 | 2011 | \$0.00 | 7 youth jobs created. |
| PS | SPF100 SOM CARES HEALTH DEPT 50 EVERGREEN AVE, SOMERVILLE | \$9,020.00 | 2011 | \$0.00 | 108 youth participated |
| PS | Project Costs | \$8,956.02 | 2011 | \$0.00 | COMPLETED |
| ESG | STREET OUTREACH CASPAR, 5 MIDDLESEX AVE, SOMERVILLE CATHOLIC CHARITIES, 270 WASHINGTON ST | \$10,344.47 | 2011 | \$21,798.53 | 1,199 people reached |
| ESG | SHELTER RESPOND, PO 555, SOMERVILLE SOM HOMELESS, 1 DAVIS SQ, SOMERVILLE | \$90,818.00 | 2011 | \$0.00 | 201 people sheltered |
| ESG | ESG ADMIN SPCD, 93 HIGHLAND AVE, SOMERVILLE | \$2,607.76 | 2011 | \$192.24 | UNDERWAY |
| | | \$495,563.54 | | | |

Emergency Solutions Grants and Recovery Funds

Emergency Solutions Grant funds were awarded primarily for street outreach, shelter operation expenses and homeless prevention activities. The City funded five (5) agencies through Emergency Solutions Grant funds that provided clients with street outreach and essential service, emergency shelter and supported services, case management and connected clients to outside resources to enable them to begin the transition from shelter to independent living and self-sufficiency. The Somerville Homeless Providers Group, five (5) of whom are ESG sub-recipients, meet monthly to share resources and develop strategies to address the underlying causes leading to homelessness. They coordinated and participated in the homeless census count.

A Homeless Providers Collaborative was formed over eight years ago to prevent Somerville residents from becoming homeless and to get them rapidly re-housed as quickly as possible. This Collaborative is comprised of 5 agencies in conjunction with the Somerville Homeless Providers Group. They began working together on a Boston Foundation homelessness prevention grant which has been funded, organizing annual fundraisers that assist at-risk residents with financial assistance and have secured additional homeless prevention funding from the Metro Boston Regional Network. This Collaborative responded to and received funding through the Homeless Prevention Rapid Re-Housing (HPRP) grant. We are fortunate in Somerville to have such a strong group of providers united to advocate for the homeless. The City consulted with the Continuum of Care on the second allocation of the Emergency Solutions Grant by identifying services and prioritizing the critical needs in the community; establishing performance standards; evaluating current ESG funds and procedures and policies around HMIS collection and reporting.

Emergency Solutions Grants and Homeless Prevention and Rapid Re-Housing (HPRP) funds addressed our Homeless Prevention goals - Provide comprehensive programs for low income individuals and families who are having difficulty meeting their basic needs and – Prevent and address homelessness by providing interpersonal and systematic supports to undermine the causes of homelessness. As noted above, extensive work has been done to meet the goals in the final year of the plan.

ESG grants were awarded and expended using HUD's eligible categories. Awarded agencies demonstrated matched funding as required by 42 USC 11375(a) (1) (see table below).

ESG Grant Matching Funds

| ESG Grant 2011 | Awarded | Eligible Activity | Match |
|---|-----------|--------------------------|--|
| CASPAR Inc 5 Middlesex Ave | \$20,706 | Street Outreach | 22K MIT in-kind, 4.6K annual appeal |
| Catholic Charities 270 Washington St | \$11,437 | Street Outreach | 7K OHCD (formerly DTA), 7K Cambridge Com Foundation, 1K Citizen's Energy |
| Respond Inc P O Box 555 | \$30,332 | Shelter Operations Costs | 230K Dept of Children & Families |
| Somerville Homeless Coalition 1 Davis Square | \$58,105 | Shelter Operations Costs | 192K DTA, 2.7K donations/events, 12.7K Emergency Food & Shelter Program |
| Transition House 32 Kent Street | \$2,381 | Essential Service | 18.6K Kent St Housing Project, 14K US Dept Housing |
| Administration 93 Highland Ave | \$2,800 | Administration | 2.8K CDBG |
| | \$125,761 | | \$514,400 |

The second allocation of the Emergency Solutions funds, \$70,741, will be awarded as of July 2012.

Evaluation of Goals

Requests for Proposals were advertised in April 2011 for the July 2011 contract year. Responders were asked to identify how their proposed program addressed the City's 5 Year Consolidated Plan. Sub recipients were awarded contracts with the Scope of Service outlining the goals for the contract, the number of clients to be served with the budget and the timeline. Invoices and back-up documentation was received monthly or quarterly and checked against contract terms. Site visit monitoring was scheduled as needed. Emergency Solutions Grant sub-recipients reported annually on progress toward their goals.

Client data for Emergency Solutions Grant and HPRP Funding was collected on clients, 32% were reported as low income and 84% were reported as very low income. Although Somerville is an ever changing city, many of its residents have been impacted by the recession. While the City is working to meet the needs of its diverse community, CDBG Public Service, Emergency Solutions and HPRP funds are an integral part of the fabric of the community. These funds enable social service organizations to leverage and garner other funds. Less than 5 percent of Public Service funds expended in FY11 were from prior year's allocation. Per contract terms, vendors can submit invoices within 90 days of the end of the contract. Most of the CDBG Public Service and ESG funds committed for FY11 have been expended.

Changes to the Program

The City of Somerville is in the process of making changes to its programs as a result of its experiences. These changes will consist of improving project selection and stream lining the overall grant management and delivery process of the City's programs.

HOME Investment Partnerships Program

Expenditures

In 2011-12 the City of Somerville expended almost **\$254,284** in HOME grant funds to further the City's goals of providing affordable housing. These expenditures included the following:

| | |
|------------------------------------|-----------|
| Housing Rehab | \$ 0 |
| Down Pmt & Closing Cost Assistance | \$ 10,000 |
| Special Housing Projects | \$ 25,000 |
| Tenant Based Rental Assistance | \$ 54,649 |
| CHDO Projects | \$ 81,057 |
| CHDO Operating Expenses | \$ 0 |
| Administration Expenditures | \$ 83,577 |

During 2011-12, the City expended \$40,305 of HOME Program Income (PI) to assist housing activities. (Please see Appendix G & H for more detail). These expenditures included the following:

| | |
|------------------------------------|-----------|
| Housing Rehab | \$ 9,000 |
| Down Pmt & Closing Cost Assistance | \$ 5,000 |
| Special Housing Projects | \$ 0 |
| Tenant Based Rental Assistance | \$ 26,305 |
| CHDO Projects | \$ 0 |

Combined, this \$254,284 of HOME grant and \$40,305 of HOME Program Income PI funds assisted 7 completed and 0 in-progress activities during the 2011-12 reporting period.

The Administrative expenditures funded salaries, associated benefits, and other overhead costs to administer the HOME funded programs in 2011-2012.

The Down Payment Assistance and Closing Cost Programs' HOME and HOME Program Income expenditures helped 3 households purchase their first home.

The Tenant Based Rental Assistance (TBRA) HOME and HOME Program Income expenditures assisted 12 families, and 16 young adults between the ages of 18 and 22, with rental assistance which assisted their transition to permanent housing.

The CHDO Project expenditures of \$81,057.09 represent the City's current year contribution to Phase 2 of the St. Polycarp Village Apartments housing-development project in-progress at 16 Butler Drive / 100 Temple Street, a 29-unit rental project for low-income and formerly homeless persons, and Phase 3 of the St. Polycarp Village Apartments housing-development project in-progress at 16 Butler Drive / 100 Temple Street, a 31-unit rental project for low-income and formerly homeless persons. Construction of St. Polycarp Village Apartments Phase 2 is 78% complete and full financing of the St. Polycarp Village Apartments Phase 3 is in progress.

The Special Projects expenditures of \$25,000 represents the City's current year contribution to the rehabilitation of a 501-unit family rental building located at 1366-1374 Broadway by the Clarendon Hill Somerville Limited Partnership. Construction is complete and all 501 units are occupied. The project created 25 handicap accessible units. Construction was completed; however, the units that were vacant at the end of the prior reporting period are now fully occupied.

Households and Persons Benefitting:

A breakdown of the HOME-assisted activities completed during the 2011-12 reporting period results in 1 homeowner household, 3 homebuyer households and 44 tenant households. The 1 homeowner household was black-Afro-American at 80% AMI, the 3 homebuyer households were 1 black-Afro-American at 80% AMI and 2 white at 80% AMI. Of the 44 tenant households, 19 were white, 21 were black-Afro-American, 3 were Asian, 0 were native American, native Alaskan, or Hawaiian or Pacific Islanders, 1 was categorized as other, and 10 were Hispanic-Latino. Thirty-three (33) tenant households were at 30% AMI, 10 were at 50% AMI, and 1 was at 60% AMI.

Overall in 2011-12, HOME assisted 48 households: 21 were white, 23 were black, 3 were Asian, and 1 was categorized as other; out of these 48 households 11 were Hispanic-Latino. Of these 48 households, 24 were 1-person households, 13 were 2-person households, 4 were 3-person households, 4 were 4-person households, 2 were 5-person households and 1 was a 6-person household; 28 heads of household were single, non-elderly persons, 3 heads of household were elderly, 6 households were single parent households, 6 households were two parent households, and 5 household was characterized as other. Thirty (30) households were female-headed and 7 households were disabled-handicapped households. (See Appendix F for more detail).

Minority and Women Business Enterprises (M/WBE):

The City of Somerville makes every effort to be inclusive in procurement processes to both minority and women owned businesses, and partners with the State Office of Minority and Women Business Assistance (SOMWBA). It should be noted that the City's Housing Rehabilitation Projects assisted with HOME funds in 2011-12 were by agreements between the City and the homeowner/developer; the homeowner/developer in turn enters into agreements with vendors to perform the work. Thus, the City is not party to this aspect of the procurement.

The City of Somerville OSPCD Housing Division does not contract directly with home improvement or other contractors. Individual property owners and developers, including the City's CHDO, solicit bids from vendors of their own choosing. Their selection is reviewed and must be approved by OSPCD. CHDO and other affordable housing developers commit to doing outreach to M/WBEs when seeking bids for construction and professional services. Of the one (1) housing development activity completed during the current CAPER period, \$604,920 in contracts and subcontract went to Women-owned businesses; \$0 went to Asian-owned businesses, \$1,882,049 went to Black/non Hispanic-owned businesses, and \$0 went to Hispanic-owned businesses.

Minority Owners of Rental Property (Owned by individuals, not corporations or partnerships): There were no (0) HOME rental activities completed during the report period owned by minority individuals.

Affirmative Marketing:

Please refer to the City of Somerville's Affirmative Marketing Policy (available for viewing at the City of Somerville Housing Division).

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. Of the one (1) housing development activity completed during the current CAPER period, Clarendon Hill Towers, a 501-unit rental project, filled vacancies through advertisement in area newspapers, local newspapers, minority newspapers, flyers, banners, and contact with area community groups. There were no HOME-Assisted Housing Rehab activities of more than 4 units.

Housing Quality Standards Inspections:

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 properties containing 25 or more HOME assisted units,
2. Every other year for properties containing from 5 to 24 HOME assisted units, and
3. Every third year for properties containing 4 or fewer HOME assisted units.

Inspections are conducted by Housing Division staff. Housing Quality Standards compliance is documented on file.

64 units were re-inspected during this time period and were all found to be in satisfactory condition.

Relocation and Real Property Acquisition:

Acquisition: There were (3) HOME First-time Homebuyer Down Payment and/or Closing Cost Assistance activities and zero (0) HOME rental activities during the report period that involved acquisition of real property: Zero (0) HOME activities involved relocation.

HOME Program: Real Property Acquisition

| Address | DPA | CCA | Development | Households | Businesses |
|------------------------|------------------|------------------|------------------|------------|------------|
| | Acquisition Cost | Acquisition Cost | Acquisition Cost | Displaced | Displaced |
| 301 Lowell Street #3 | | 5,000 | | 0 | 0 |
| 411 Norfolk Street #1D | | 5,000 | | 0 | 0 |
| 88 Wheatland Street #7 | | 5,000 | | 0 | 0 |
| Total: | | 15,000 | | | |
| 1,138,600 | | | | | |

Timely Commitment and Expenditure of Home Funds:

As of June 30, 2012, 97.72% of 2010 HOME funds were committed to eligible activities including required reservations for Community Housing Development Organizations (CHDO), and 100% of 2007 HOME funds were disbursed.

HOME Fund Expenditure

| HOME Grant | Required Commitments | Committed as of 6/30/2012 | Required Expenditures | Expended as of 6/30/2012 | Required Commitments to CHDO | Committed to CHDO as of 6/30/2011 |
|------------|----------------------|---------------------------|-----------------------|--------------------------|------------------------------|-----------------------------------|
| 2010 | \$15,528,036 | \$15,174,192 | | | \$2,329,205 | \$6,363,190 |
| 2007 | | | \$12,733,581 | \$14,343,610 | | |

Energy Star Units:

Of all newly constructed/gut rehab housing units completed and underway during the period 07/01/11 to 6/30/12

| | | | |
|------------------------------|----|---------------------------------|------|
| Total no. of units completed | 37 | Total no. of units underway | 0 |
| No. Energy Star qualified | 0 | No. to be Energy Star qualified | 37 |
| % Energy Star | 0% | % Energy Star | 100% |

There are 37 units of new construction that are awaiting Energy Star rating certification in the St. Polycarp Village Apartments Phase 2 at 16 Butler Drive, and Cross Street Supportive Housing at 75 Cross Street.

Planning & Administration

The City remained within its cap of 20% of CDBG funds for various planning, administration, and capacity-building activities for 2011-2012 including a transportation and infrastructure study for the Union Square area. Planning & Administration expenses totaling \$533,816 represents 18.82% of the City's 2011-2012 entitlement grant of \$2,585,669 and program income of \$250,379.

Community Development Project Costs

In direct support, management and supervision of the various funded projects and activities, the City expended a total of \$438,379 in CDBG funds. This includes direct wages and associated fringe benefits for this work.

Section 108 Loans

The City expended \$305,160 in CDBG funds for the final principal and interest payment on its Section 108 Loan. This payment represents the debt service for the purchase of the Boynton Yards properties.

In addition the aforementioned spending, the City progressed on the Activities promoting long-range planning highlighted in the table below:

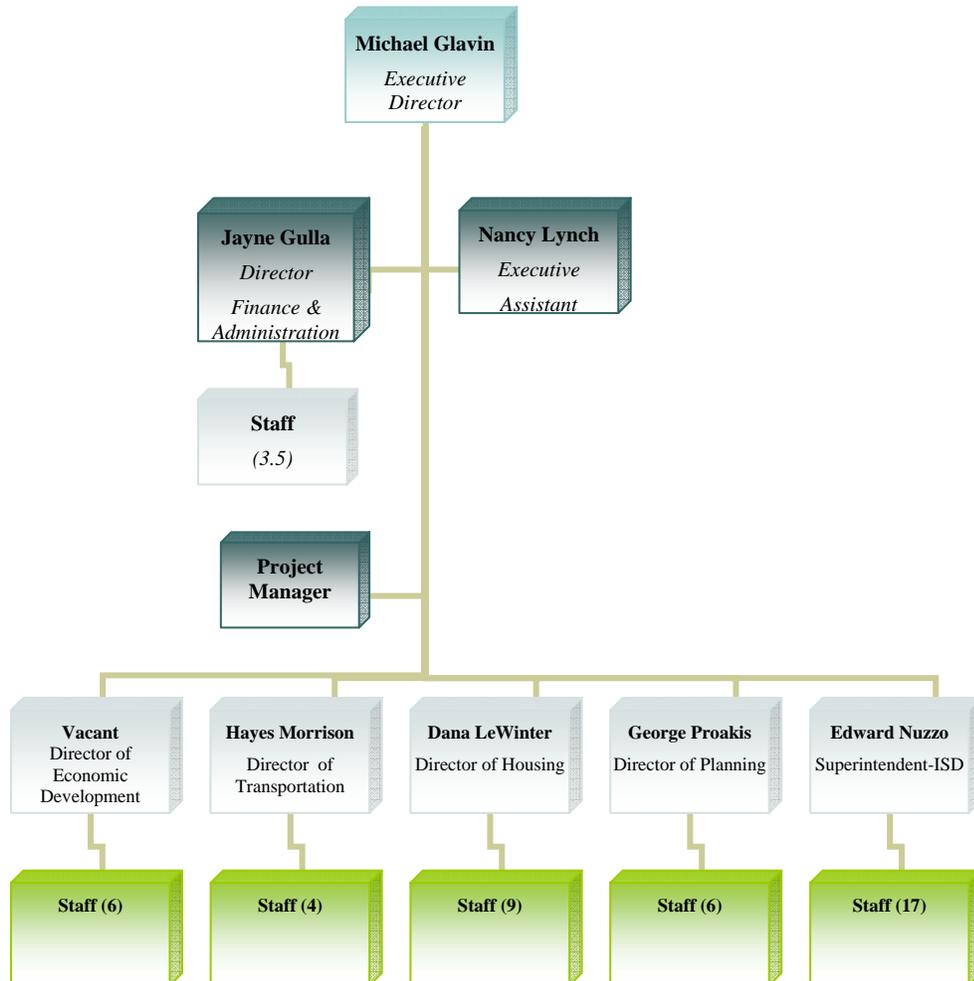
PY11 2011-2012 Other Accomplishments

| Program | CDBG Funds Spent | Year | Status |
|---|-------------------------|-------------|---------------|
| PLANNING & ADMINISTRATION | \$ 533,816 | 2011 | Complete |
| COMMUNITY DEVELOPMENT PROJECT COSTS | \$ 438,379 | 2011 | Complete |
| COMMUNITY & HOUSING DEVELOPMENT PROJECT | \$ 281,550 | 2011 | Complete |
| SECTION 108 LOAN REPAYMENTS | \$ 305,160 | 2011 | Complete |
| | \$ 1,558,186 | | |

OTHER ACTIONS

Managing the Process and Institutional Structure:

The City of Somerville administers all its HUD funded activities through the Office of Strategic Planning and Community Development (OSPCD). Under the direction of the Executive Director of OSPCD, and the Director of Finance and Administration, the City of Somerville assesses, plans, and carries out the various projects and activities to further the goals and objectives outlined in the One Year Action Plan and the Five Year Consolidated Plan.



As is illustrated in the above organizational chart, the City's OSPCD is organized into six separate divisions: Finance & Administration, Housing, Economic Development, Planning, Transportation & Infrastructure, and Inspectional Services. This organizational structure allows optimum cross-coordination among various divisions involved in the community development process.

Coordination with Other Organizations

The City, both in its planning and its execution of community development programs and activities, is continually working with other City departments, organizations, outside agencies and institutions in order to effectively carry out its mission.

Over 26 different public service organizations received funding for this year, 5 different outside agencies received Emergency Solutions Grant funding, and the City worked with its CHDO (Somerville Community Corporation) on affordable housing production and other issues.

The City coordinated planning activities for transportation and infrastructure projects with many different local, regional, state and federal agencies, including: Somerville DPW, MassHighway Department, the State MPO, MAPC, State Executive Office of Transportation, the Massachusetts Bay Transportation Authority, the Federal Transit Administration, and the Department of Conservation and Recreation.

The City's Housing activities were coordinated with the Somerville Community Corporation, the Affordable Housing Trust Fund, the Somerville Homeless Providers Group, and various State and federal offices.

Monitoring

The City of Somerville worked closely with all its sub-recipients in order to ensure the goals and objectives of the HUD programs are adhered to and National Objectives are being met. The Mayor's Office of Strategic Planning (MOSPCD) was responsible for both the financial and program monitoring of sub-recipients activities to provide assurance 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 findings and evaluated the impact of sub-recipient activities to comply with applicable federal regulations.

Sub-recipients enter 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 reporting from sub-recipients allowed the City to monitor progress each was making toward its year-end goal(s). On-site monitoring was also conducted by OSPCD to further ensure that overall funding goals and objectives were being met.

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

As noted above under Housing Quality Standards Inspections, housing activities were also monitored with the assistance of Housing Inspectors and staff, and where appropriate, 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.

Monitoring included the review of the sub-recipient's internal controls to determine if the financial management and the accounting system were adequate to account for program funds in accordance with federal requirements. Monitoring activities included core monitoring areas: activities allowed or disallowed (specific activities identified in the contract agreement); allowable costs (costs paid are reasonable and necessary for operation and administration of 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 was assessed to determine the level of monitoring that should be performed to assure the entity was in compliance with federal program laws and regulations. Some determining factors were the sub-recipient's prior experience managing and accounting for federal funds; program's prior experience with the sub-recipient; etc.

The following were tools used for monitoring sub-recipients

- Review of progress reports and documentations;
- Careful review of billings and supporting documentation accompanying reimbursement requests
- Single review audits and evaluate any finding;
- Perform on-site visits to review financial and programmatic records; observe operations; inspect facility to ensure compliance with program requirements; interview staff to ensure that they are informed and carry out program policy and regulations.

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 to review of sub-recipients (newspapers, radio and television).

Monitoring follow-up was done to ascertain corrective action had been done for any problem or deficiency that may have been identified.

Adequate documentation was maintained to assure monitoring occurred.

As noted above under Housing Quality Standards Inspections, housing activities were also monitored with the assistance of Housing Inspectors and staff, and where appropriate, the City's Building Inspectors. This allows for multiple levels of oversight of various federally funded activities to ensure compliance with all local, state, and federal requirements.

SUMMARY/PROGRAM EVALUATION/CONCLUSIONS

In 2011-2012, the City of Somerville made final progress towards the implementation of the broader vision laid out in the City's 2008-2013 Five Year Consolidated Plan. Under Economic Development, the Union Square Main Streets and Union Square Farmers' Market Activities continued their successes and progress continued on Assembly Square and Union Square redevelopment planning. In the areas of Historic Preservation, and Housing, the City continues to make progress towards its 5 Year Goals. Reflecting the need for public services in the City of Somerville, as well as aggressive management of limited resources, the City of Somerville has achieved or surpassed most of its 5 Year Consolidated Plan Goals in the Public Services Grants and Emergency Solutions Grants programs. Overall, year five of the City's 5 Year Consolidated Plan showed marked progress in many areas, and with additional planning and phases of other work being performed on Assembly Square and Union Square areas, the foundation has been laid for even further progress under a new Consolidated Plan in the years to come.

SUPPLEMENTARY NARRATIVES

Use of CDBG Funds

In program year 2011-2012, the City of Somerville's CDBG expenditures complied with the objectives and priorities outlined in the 2008-2013 Consolidated Plan. More information on these expenditures can be found in the Assessment of Goals and Objectives section above.

Changes to Program Objectives

During the 2011-2012 program year no substantive changes were made to the program objectives laid out in the 2011-2012 Action Plan.

Compliance with Planned Actions

All CDBG resources were utilized in the furtherance of the goals and objectives of the 2008-2013 Consolidated Plan.

Compliance with National Objectives

In program year 2011-2012, the City of Somerville expended funds in the furtherance of the three National Objectives of the CDBG program. The City has focused to a large degree on CDBG expenditures for low/moderate area benefit. The City has also complied with the overall benefit certification:

| PY11 Expenditures Meeting National Objective | |
|--|-------------|
| Total 2011-2012 CDBG Expenditures | \$2,083,262 |
| Total Program Administration | \$533,816 |
| Total Subject to Low/Mod Benefit Calculation | \$1,620,420 |
| Total Non-National Objective Expenditures (Sec108 Loan Payments) | \$305,160 |
| % PY11 Expenditures Meeting National Objective | 77.78% |

Relocation

In program year 2011-2012, no CDBG funds were expended on projects that required the permanent displacement or relocation of people, businesses, or organizations from occupied property. The City of Somerville did provide some temporary to families for relocation assistance through the Housing Rehabilitation program where units of housing were being rehabilitated.

Economic Development Activities

Please see the discussion of Economic Development activities in the Assessment of Five Year Goals and Objectives section of this report.

Limited Clientele Activities

In addition to the City's Public Services activities (which benefit low and moderate income clientele), the City funded and expended CDBG resources that served limited clientele. These activities included:

- Groundwork Somerville Activities (Public Facility Improvements)
- Trum Field House ADA (Americans with Disabilities Act) Design & Construction of accessibility features.

Program Income

For the program year 2010-2011, Program Income was generated in the following categories:

PY11 Program Income

| Program | Funding Source | Amount |
|----------------------------------|-----------------------|------------------|
| Housing Rehab Loans | CDBG | \$249,153 |
| Housing Rehab Loan Service Fees | CDBG | \$1,226 |
| Total CDBG Program Income | CDBG | \$250,379 |
| | | |
| Housing Rehab Loans | HOME | \$40,450 |
| Housing Development Loans | HOME | \$34,028 |
| Total HOME Program Income | HOME | \$74,478 |

The Housing Rehab Loan program income represents repayments of various loans outstanding for both the CDBG and HOME programs.

The Public Service Grant program did not generate program income.

Loans & Other Receivables

The City has outstanding loans receivable from homeowners who participate in the City's Housing Rehabilitation program. The following table below provides summary information regarding these loans.

TABLE ## PY11 Housing Loans FORGIVEN 7/1/11 - 6/30/12

| Program | # of Loans | Principal Balance |
|----------------|-------------------|--------------------------|
| CDBG Loans | 2 | \$8,800 |
| HOME Loans | 2 | \$31,250 |
| LEAD Loans | 31 | \$638,832 |
| LHRD Loans | 7 | \$152,590 |
| SAHTF Loans | 5 | \$15,000 |

TABLE ## PY11 Housing Loans OUTSTANDING 7/1/11 - 6/30/12

| Program | # of Loans | Principal Balance |
|----------------|-------------------|--------------------------|
| CDBG Loans | 147 | \$3,215,022 |
| HOME Loans | 109 | \$7,738,501 |
| LEAD Loans | 20 | \$346,112 |
| LHRD Loans | 48 | \$1,072,718 |
| SAHTF Loans | 105 | \$1,486,951 |

TABLE ## PY11 Housing Loans NEW 7/1/11 - 6/30/12

| Program | # of Loans | Principal Balance |
|----------------|-------------------|--------------------------|
| CDBG Loans | 12 | \$256,979 |
| HOME Loans | 6 | \$77,397 |
| LEAD Loans | 0 | \$0 |
| LHRD Loans | 15 | \$354,190 |
| SAHTF Loans | 10 | \$113,500 |

TABLE ## PY11 Housing Loans PAID 7/1/11 - 6/30/12

| Program | # of Loans | Principal Balance |
|----------------|-------------------|--------------------------|
| CDBG Loans | 15 | \$258,429 |
| HOME Loans | 3 | \$44,478 |
| LEAD Loans | 0 | \$0 |
| LHRD Loans | 0 | \$0 |
| SAHTF Loans | 3 | \$231,422 |

HUD Neighborhood Revitalization Strategies

The City of Somerville continues to accelerate efforts to revitalize two important Neighborhood Revitalization Strategy Areas (NRSA's): 1) Union Square, and 2) East Somerville.

Both NRSA's are located generally in the eastern part of the City of Somerville. The Union Square NRSA includes the intersection of Bow Street, Somerville Avenue and Washington Street. This area represents a high-density residential population of low and moderate income persons and a central business district. Planned construction of the Union Square MBTA Green Line transit and extension from the Lechmere Station is ongoing in the Union Square NRSA. The East Somerville NRSA includes parts of Somerville commonly referred to as East Somerville, Brickbottom, Inner Belt and Assembly Square. Route 28 (known as McGrath Highway and the Fellsway), the Mystic River, the Boston City line, and railroad tracks outline the NRSA. These boundaries represent an area that contains a high-density residential population of low and moderate income persons, a local commercial corridor, and major regional commercial districts.

Union Square:

Work in the Union Square NRSA continued with the growth of the Union Square Main Streets program, as well as the Union Square Farmers' Market. Arts Union, and Milk Row Cemetery Restoration Projects have also seen progress and are supporting the City's larger goals in this area.

The City of Somerville continues to move forward with planning efforts for the revitalization of Union Square. In support of this goal, in 2011-2012 the City:

- 1) Advanced the Union Square Transportation and Infrastructure study by selecting a locally preferred alternative for a new roadway network that balances the needs of all modes and increase the usable open space in the square to 40,000 sq ft.,
- 2) Secured development agreements with two property owners in Boynton Yards for future Transit Oriented Development projects,
- 3) Completed a Supplemental MCP Phase II and Phase III report for remediation of the Kiley Barrel Brownfield site,
- 4) Initiated a Municipal Space Needs Analysis and Master Facilities Plan which identifies surplus land for redevelopment,
- 5) Continued to promote and plan for the introduction of MBTA Green Line service to Union Square, and,
- 6) Continued construction of roadway improvements leading into Union Square on Somerville Avenue.

These specific efforts are in addition to other efforts funded through the CDBG program for programs such as the Housing Rehabilitation program, and the Street Tree Planting program.

East Somerville NRSA:

Work on the East Somerville NRSA, which encompasses the Assembly Square area, continued in 2011-2012 with CDBG funded projects including design of the East Broadway Streetscape Project, the Storefront Improvements Program, and the fifth year of the East Somerville Main Streets organization. The micro-enterprise loan assistance program through the City's partner Accion, USA saw targeted outreach efforts in both the East Somerville and Union Square NRSA's. Tree plantings through the CDBG funded Street Tree Planting Program also focuses on East Somerville. These specific efforts are in addition to other efforts funded through the CDBG program for programs such as the Housing Rehabilitation program which can benefit the

East Somerville NRSA in individual cases. Please see the East Somerville Performance Matrix in the Appendix to this document for further information.

Community Challenge Grant

In 2011, the City of Somerville became the only municipality in Massachusetts to receive a Community Challenge Planning Grant from HUD, USDOT and EPA. The \$1.8 million grant award is helping the City and its partners to expedite planning for transit-based revitalization, with major grant-funded activities including the completion of the City's first-ever Comprehensive Plan; creation of neighborhood-based Station Area Plans around future transit stations; overhaul of the antiquated Somerville Zoning Ordinance; streamlining of the City's permitting processes; and, creation of a land bank for affordable housing around new transit stations.

The interdisciplinary approach to policy development that has characterized Somerville's core HUD-funded projects and programs is reinforced by the Challenge Grant activities. The City's emphasis on meaningful public participation is also reflected in the Challenge Grant work plan, with robust and creative public engagement strategies embedded throughout each work task.

Performance Measurement

The City of Somerville is placing increased emphasis on measuring performance, not just for HUD funded programs but city-wide. The City continues to refine its system of program-based budgeting with the assistance of the Somerstat Department and the City Auditor's Department. The City utilizes HUD's performance measurement system as a part of its planning, reporting, project management and monitoring. The 2008-2013 Consolidated Plan establishes goals and objectives. Accomplishments for the 2011-2012 reporting period is summarized in the following tables below including, Provide Decent Affordable Housing, Create Economic Opportunities, and Create Suitable Living Environment.

Provide Decent Affordable Housing

| <u>Objective/Outcome Specific Obj #</u> | <u>Source of Funds</u> | <u>Performance Indicators</u> | <u>5 Year Plan Goals</u> | <u>FY2011 Accomplishments</u> | <u>Project Progress</u> |
|--|-------------------------------------|---|--|---|---|
| <i>Increase Availability/Accessibility of Decent Affordable Housing</i> | | | | | |
| Improve the availability by creating new affordable housing units | HOME | Number of permanent affordable housing units created | 100 | Underway | Larger scale project requiring multiple levels of funding and phased construction. See page 17. |
| Prevent and end homelessness | CDBG | Number of homeless programs assisted to create new permanent housing | Obtain \$1.5M for homeless programs annually | CoC funding for 20 programs | Completed. |
| Remove Barriers to Housing | City's Inclusionary Housing Program | Number of households w/access to affordable rental units and home ownership | Create 6 units | 27 affordable rental units and 5 affordable homeownership units | Completed. |
| <i>Improve the Affordability of Decent Affordable Housing</i> | | | | | |
| Increase affordability of rental housing | HOME | Number of households with rental assistance | Assist 30 tenants per year | 28 low income households assisted | Completed. |
| Increase affordable home ownership | HOME | Number of households purchasing a home w/down payment assistance | Assist 2 first time homebuyers annually | 3 households assisted | Completed. |
| Maintain and improve housing stock through rehabilitation assistance | CDBG, HOME, and LEAD | Number of housing units assisted with repairs and lead paint abatement | Rehabilitate 40 housing units annually | 19 units rehabilitated, 29 units abated for lead. | Completed. |

Create Suitable Living Environment

| Objective/Outcome Specific Obj # | Source of Funds | Performance Indicators | 5 Year Plan Goals | FY2011 Accomplishments | Project Progress |
|--|--------------------------------|--|---|---|--|
| <i>Increase the Availability/Accessibility of Suitable Living Environment</i> | | | | | |
| Provide opportunities to improve residents social, economic, and political situation | CDBG | Number of residents served | Serve 2,160 residents over 5 years | 314 residents served | Completed for program year. |
| Provide children with opportunities to live healthy productive lives | CDBG | Number of households served | Serve 885 households over 5 years | 313 households served | Completed for program year. |
| Provide education and leadership opportunities for youth | CDBG | Number of youth served | Serve 780 youth over 5 years | 568 youth served | Completed for program year. |
| Provide comprehensive programs for low-income individuals and families meeting basic needs | CDBG | Number of residents supported | Support 1,200 residents each year | 378 residents served | Completed for program year. |
| Prevent homelessness | ESG | Numbers of residents assisted | Provide case management to 1,000 residents over 5 years | 4,813 residents served | Completed for program year. |
| Provide support services for elderly and disabled | CDBG | Number of residents served | Serve 2,100 | 760 elderly served | Completed for program year. |
| <i>Improve the Sustainability of a Suitable Living Environment</i> | | | | | |
| Renovate existing parks | CDBG | Number of Parks Renovated | Renovate 6 parks within 5 years | 2 parks completed, 2 improved, and 4 underway | Large scale, multi-year park projects see pages 13-14. |
| Increase tree canopy | CDBG | Number of Trees Planted | Plant 100 trees annually | 86 trees planted | Completed. |
| Programs that encourage the improvement of significant resources | CDBG | Number of Historic Preservation Projects | Improve access to 1 to 2 historic sites | Underway | Multi-year renovation projects. See pages 15-16 for details. |

| | | | | | |
|---|------|---|-----------------------------------|----------|--|
| Enhance streetscapes, roadways, and intersections | CDBG | Number of Infrastructure projects | Complete Lower Broadway | Underway | Larger scale Infrastructure project requiring multiple levels of funding and phased construction. See page 12. |
| Improve pedestrian and bicycle accessibility | CDBG | Number of Neighborhood Improvement Projects | Complete design of community Path | Underway | Larger scale capital project requiring multiple levels of funding and phased construction. See page 12. |

Create Economic Opportunities

| <u>Objective/Outcome Specific Obj #</u> | <u>Source of Funds</u> | <u>Performance Indicators</u> | <u>5 Year Plan Goals</u> | <u>FY2011 Accomplishments</u> | <u>Project Progress</u> |
|--|-------------------------------|--|--|--------------------------------------|--------------------------------|
| <i>Increase the Availability/Accessibility of Economic Opportunities</i> | | | | | |
| Support new businesses with technical assistance | CDBG | Number of businesses receiving assistance | 30 businesses | 5 | Completed for program year. |
| Enhance vitality of existing commercial districts through support of existing businesses | CDBG | Number of commercial spaces assisted through storefront improvements | 4 projects annually | 14 | Completed for program year. |
| Build partnership between city government and community members | CDBG | Number of City liaisons established with community groups | Engage in 2 collaborative projects | 2 | Completed for program year. |
| Encourage investment and development in under low to moderate income areas | CDBG | Number of individuals and businesses receiving assistance | Promote redevelopment of strategic districts | Final payment of section 108 loan | Completed for program year. |
| Increase local job opportunities | CDBG | Number of jobs created | Attract one new business per year | 6 full time positions | Completed for program year. |

Funds Leveraged

City activities funded with federal CDBG, HOME, and ESG also receive financial assistance from other sources including other federal and state programs. The Following table and pie chart show the breakout of funds leveraged for program year 2011.

2011 Leveraged Funds Expended

| Activity | CDBG | HOME | ESG | CDBG-R | City General Fund | Other Non-Federal Match | Other State & Federal | Total |
|---------------------------------|--------------------|------------------|------------------|------------------|-------------------|-------------------------|------------------------|--------------------|
| Planning & Admin | \$533,816 | \$74,561 | | | \$79,107 | | | \$687,484 |
| Economic Development | \$407,255 | | | \$116,794 | \$109,933 | \$140,000 ¹ | \$376,120 ² | \$1,150,102 |
| Transportation & Infrastructure | \$40,849 | | | | \$121,855 | \$687,176 ³ | \$106,868 ⁴ | \$956,748 |
| Parks & Open Space | \$256,073 | | | | | \$397,863 ⁵ | \$640,000 ⁶ | \$1,293,936 |
| Historic Preservation | \$12,509 | | | | | | | \$12,509 |
| Affordable Housing | \$513,611 | \$202,011 | | \$162,067 | \$14,405 | | \$832,078 ⁷ | \$1,724,172 |
| Public Services | \$414,586 | | | | | \$888,534 ⁸ | | \$1,303,120 |
| Emergency Solutions | | | \$125,761 | | | \$514,400 ⁸ | | \$640,161 |
| Section 108 Loans | \$305,160 | | | | | | | \$305,160 |
| Project Costs | \$438,379 | | | \$31,842 | | | | \$470,221 |
| | \$2,922,238 | \$276,572 | \$125,761 | \$310,702 | \$325,300 | \$2,627,972 | \$1,955,066 | \$8,543,611 |

¹Sub-Recipient matching funds.

²EPA Hazard, MA DEP, and MA DOT Funds.

³State Grant and MA DOT

⁴HUD Community Challenge Grant

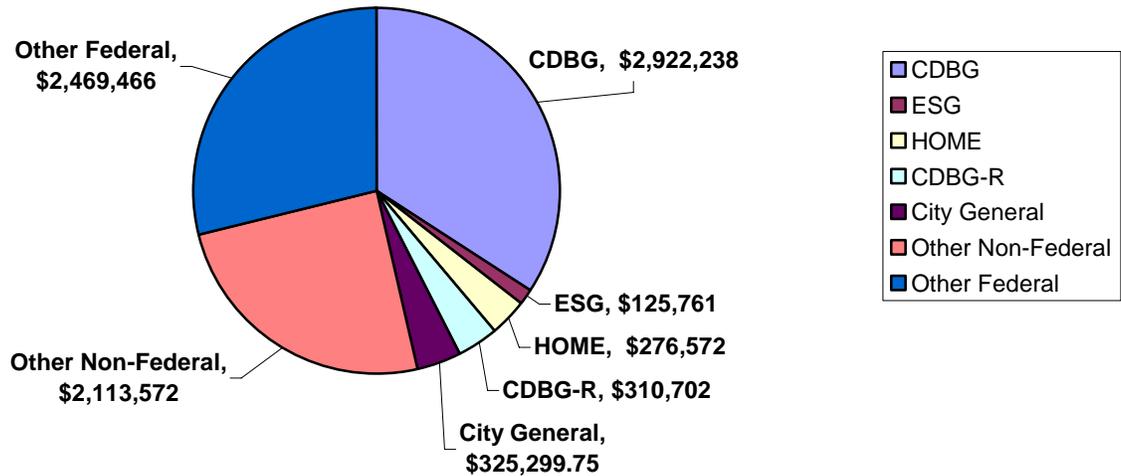
⁵City Bond

⁶PARC Grant

⁷HUD Healthy Homes and LEAD Grants

⁸Private sources

2011 Leveraged Funds Expended



2011-2012 Public Service Agency Match Contributions:

| Agency | Awarded 11-12 | Match Amount | Match Source |
|-----------------------------|----------------------|---------------------|--|
| Boys & Girls Clubs | \$9,235 | \$ 17,500 | Amgen Foundation |
| Cambridge Pub Health | \$3,000 | \$45,490 | MA Dept of Public Health for Family Planning and Somerville School Dept |
| CASPAR Inc | \$5,000 | \$20,311 | Cambridge CDBG |
| | | | |
| Ctr Teen Empowerment | \$76,670 | \$36,500 | Shannon Funding, , United Way, Somerville Health Foundation, ticket sales/fees |
| Eliz Peabody House | \$9,020 | \$56,000 | United Way, Garland Memorial Trust |
| Guidance Center | \$4,500 | \$27,000 | Cambridge CDBG, Cambridge Foundation |
| Groundwork Somerville | 4,500 | 18,000 | Foundations (Miller, Lewellyn, MET) |
| Haitian Coalition | \$9,020 | \$51,000 | Tufts University, United Way |
| Just-a-Start Corp | \$4,250 | 10,000 | Corporate, foundation and private sources |
| MAPS Port. Speakers | \$5,190 | \$29,000 | Cambridge. CDBG, Blue Cross Blue Shield |
| Mystic Learning Center | \$16,240 | \$62,697 | Somerville Housing Authority, Metro North Regional Employment Board |
| Respond Inc | \$18,540 | \$54,000 | Dept. of Children and Families, event contributions |
| SCM Com. Transport. | \$65,850 | \$55,750 | Medford and Cambridge CDBG |
| Somerville Comm. Corp | \$9,020 | \$170,000 | Dept of Justice, Somerville School Department |
| Somerville Homeless BetHom | \$7,045 | \$38,675 | HUD, Anonymous Foundation |
| Somerville Homeless SOUP | \$63,387 | \$29,085 | Emergency Food Shelter Program (EFSP), Project Bread & Donations |
| Som. Homeless Inf/Ref | \$8,570 | \$34,244 | Donations |
| Som. YMCA | \$6,525 | \$32,000 | Partners w/Youth, United Way |
| Som. YMCA CIT/LIT | \$22,550 | 00 | |
| Transition House | \$4,750 | \$32,992 | Kent St Housing Partnership |
| Wayside Youth & Family | \$4,000 | \$5,890 | Center for Substance Abuse Prevention |
| Welcome Project | \$8,120 | \$33,000 | Foundations (Johnson Family, Clipper Ship, Rothchild and Janey Fund) |
| Som. Arts Council | \$8,840 | \$15,400 | Somerville Housing Auth, private foundation, fees |
| Som. Cares About Prevention | 9,020 | 100,000 | MA Dept of Public Health Bureau of Sub Abuse |
| SomSom Youth Program | \$5,000 | | |
| | \$387,842 | \$888,534 | |

ESG Agency Match Contributions:

| Agency | Awarded 11-12 | Match Amount | Match Source |
|-------------------------------|------------------|------------------|---|
| CASPAR, Inc Com | \$20,706 | \$26,600 | MIT in Kind, annual appeal |
| Catholic Charities | \$11,437 | \$15,000 | Dept of Trans. Assistance, Cambridge Foundation, Citizen's Energy |
| Respond Inc | \$30,332 | \$230,000 | Dept of Children & Families |
| Somerville Homeless Coalition | \$58,105 | \$207,400 | Dept of Trans. Assistance, Emergency Food, Events Donations |
| Transition House | \$2,381 | \$32,600 | Kent St Housing Project & US Dept of Housing |
| ESG Admin | 2,800 | 2,800 | City Appropriations |
| Totals | \$125,761 | \$514,400 | |

Housing Division Matching Contributions:

| | | |
|---|--------------|---------------------------------------|
| Private Funds for Housing Rehabilitation | \$1,725 | Homeowners' own funds |
| Private Funds for Down Payment/Closing Cost | \$49,287 | Homebuyers' own funds |
| Private Mortgages for First Time Homebuyers | \$410,966 | Public & Private Lending Institutions |
| Private Mortgages for Housing Developers | \$62,037,511 | Public & Private Lending Institutions |

Home Matching Contribution:

All HOME funds require a twenty-five percent (25%) match from non-federal sources except for Administration funds (AD), Community Housing Development Organization Operating funds (CO), Program Income funds (PI), and all 1992 funds. Match obligation is incurred as HOME funds are drawn down from the Federal Treasury into the City's account. Match obligation is incurred whether or not the activity is complete. The City drew down \$294,589 of HOME and HOME PI funds during the program year. Excluding \$83,577 of AD and CO funds and \$40,305 of PI funds drawn, the amount requiring the 25% match was \$170,706 for a match liability of \$42,677.

The City was able to report \$223,812 of match this period which it received in the form of two non-federal funds grants contributed to the Clarendon Hill Towers Special Housing Project.

Parks & Open Space Matching Contributions

| | |
|-------------------------------------|--------------------|
| 15-25 Cross Street / Harris Park | \$781,250 |
| Morse-Kelley Playground | \$600,000 |
| Dickerman Playground | \$400,000 |
| Total Parks & Open Space | \$1,781,250 |

Transportation & Infrastructure

| | |
|-------------------------------------|--------------------|
| East Broadway Streetscape | \$6,530,964 |
| Community Path | \$2,100,000 |
| Total Parks & Open Space | \$8,630,964 |

Economic Development Matching Funds

| | |
|-----------------------------------|------------------|
| Arts Union | \$20,000 |
| Storefront Improvements | \$100,000 |
| East Somerville Main Streets | \$20,000 |
| Total Economic Development | \$140,000 |

CITIZEN PARTICIPATION SUMMARY

As outlined in both the Five Year Consolidated Plan and the One Year Action Plan, the City of Somerville follows a public participation plan designed to solicit citizen input, while at the same time helping to inform the public of resources, emerging needs, and restrictions and limitations of available resources.

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 2011-2012 HUD year the City of Somerville held 2 public hearings and many other focus groups in order to develop the City's 2008-2013 Consolidated Plan. Outreach for these programs included hearing notices in local newspapers, announcements on the City's website, video showings of public hearings on the local access cable channel, and other announcements to interested persons and groups.

Moving forward into program year 2012-2013, 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 program year 2011-2012 CAPER, the City of Somerville made available drafts of this document in the following locations: OSPCD Office, and City Hall Annex. A public hearing was held on Thursday, October 4, 2012 at the Ralph and Jenny Senior Center at 9 New Washington St. Somerville, MA. This public hearing was advertised in the local newspaper. No comments were received concerning this CAPER.



Office of Community Planning and Development
 U.S. Department of Housing and Urban Development
 Integrated Disbursement and Information System
 PR26 - CDBG Financial Summary Report
 Program Year 2011
 SOMERVILLE , MA

PART I: SUMMARY OF CDBG RESOURCES

| | |
|--|--------------|
| 01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR | 6,822,680.56 |
| 02 ENTITLEMENT GRANT | 2,585,669.00 |
| 03 SURPLUS URBAN RENEWAL | 0.00 |
| 04 SECTION 108 GUARANTEED LOAN FUNDS | 0.00 |
| 05 CURRENT YEAR PROGRAM INCOME | 250,378.55 |
| 06 RETURNS | 305,160.00 |
| 07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE | 0.00 |
| 08 TOTAL AVAILABLE (SUM, LINES 01-07) | 9,963,888.11 |

PART II: SUMMARY OF CDBG EXPENDITURES

| | |
|--|--------------|
| 09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION | 2,083,262.26 |
| 10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT | 0.00 |
| 11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10) | 2,083,262.26 |
| 12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION | 519,676.87 |
| 13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS | 305,160.00 |
| 14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES | 14,139.26 |
| 15 TOTAL EXPENDITURES (SUM, LINES 11-14) | 2,922,238.39 |
| 16 UNEXPENDED BALANCE (LINE 08 - LINE 15) | 7,041,649.72 |

PART III : LOWMOD BENEFIT THIS REPORTING PERIOD

| | |
|--|--------------|
| 17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS | 1,404.00 |
| 18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING | 951,990.00 |
| 19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES | 667,026.40 |
| 20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT | 0.00 |
| 21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20) | 1,620,420.40 |
| 22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11) | 77.78% |

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

| | |
|---|----------------------------|
| 23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION | PY: 2009 PY: 2010 PY: 2011 |
| 24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION | 2,899,092.88 |
| 25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS | 2,402,561.52 |
| 26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24) | 82.87% |

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

| | |
|---|--------------|
| 27 DISBURSED IN IDIS FOR PUBLIC SERVICES | 414,586.15 |
| 28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR | 18,957.85 |
| 29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR | 29,849.53 |
| 30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS | 0.00 |
| 31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30) | 403,694.47 |
| 32 ENTITLEMENT GRANT | 2,585,669.00 |
| 33 PRIOR YEAR PROGRAM INCOME | 582,332.63 |
| 34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP | 0.00 |
| 35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34) | 3,168,001.63 |
| 36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35) | 12.74% |

PART V: PLANNING AND ADMINISTRATION (PA) CAP

| | |
|--|--------------|
| 37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION | 519,676.87 |
| 38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR | 14,139.26 |
| 39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR | 0.00 |
| 40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS | 0.00 |
| 41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40) | 533,816.13 |
| 42 ENTITLEMENT GRANT | 2,585,669.00 |
| 43 CURRENT YEAR PROGRAM INCOME | 250,378.55 |
| 44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP | 0.00 |
| 45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44) | 2,836,047.55 |
| 46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45) | 18.82% |