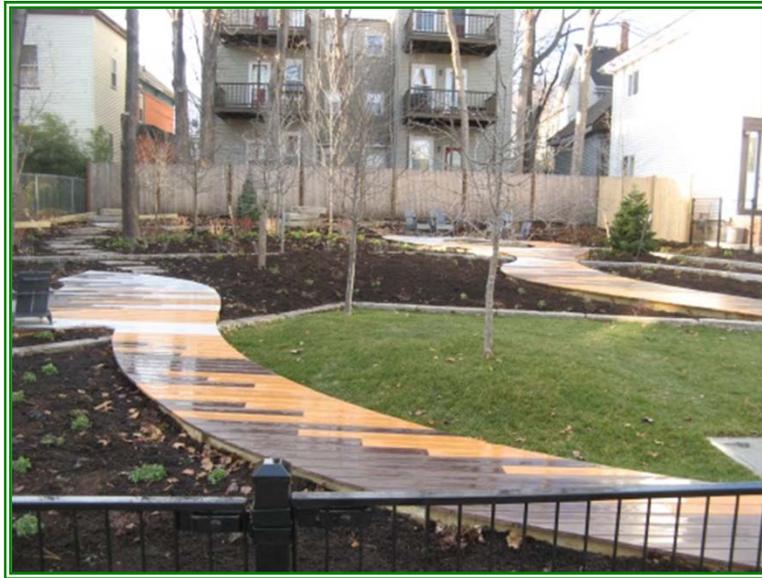


# C A P E R



JULY 1, 2012 –  
JUNE 30, 2013



Somerville  
Massachusetts

## Consolidated Annual Performance and Evaluation Report

**MAYOR JOSEPH A. CURTATONE**

MAYOR'S OFFICE OF STRATEGIC PLANNING  
AND COMMUNITY DEVELOPMENT



# Fifth Program Year CAPER

## Table of Contents

<u>Executive Summary</u> .....	1
Overview.....	4
<u>Introduction</u> .....	6
<u>Assessment of Goals and Objectives (Project Summaries)</u> .....	8
Economic and Community Development .....	8
Transportation and Infrastructure .....	11
Parks & Open Space .....	12
Housing .....	14
Public Service Grants .....	26
Emergency Solutions Grants .....	32
HOME Program.....	39
Planning and Administration.....	42
C.D. Project Costs.....	42
<u>Other Actions</u> .....	43
Managing the Process & Institutional Structure... ..	43
Coordination with Other Organizations.....	44
Monitoring.....	44
<u>Supplemental Narratives</u> .....	46
Use of CDBG Funds .....	46
Change to Program Objectives .....	46
Compliance with Planned Actions.....	46
Compliance with National Objectives.....	46
Relocation.....	46
Economic Development Activities.....	47
Limited Clientele Activities.....	47
Program Income.....	47
Loans & Other Receivables.....	47
HUD Neighborhood Revitalization Strategies.....	49
East Somerville.....	49
Union Square.....	52
Community Challenge Grant.....	55
<u>Performance Measurement</u> .....	56
<u>Funds Leveraged</u> .....	59
<u>Citizen Participation Summary</u> .....	63
<u>Appendix</u>	
ESG CR-60	
Financial Summary (PR 26 Report)	
CAPER Public Hearing Notice	
PRO3 Report	
PRO2 Report	
Maps	
HOME Details	
HOME Form 40107	
HOME Form 40107A	

## **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 2012-2013 (July 1, 2012 – to June 30, 2013), Somerville received \$2,435,932 in CDBG funds, \$480,840 in HOME funds, and \$223,912 in HESG funds. During that same time period the City of Somerville expended \$2,774,926 in CDBG funds, \$1,044,339 in HOME funds, and \$194,735 in ESG funds. Since 1989, the City has received over \$97 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, essential supportive services, as well as support activities to help persons maintain their homes or to rapidly re-house those who have become homeless. It can assist with the operational costs of the shelter facility, administration of the grant, in addition to, short term rental assistance, housing search services, utility payments and case management to homeless persons or persons at imminent risk of losing their own housing.

ESG funds are available for street outreach – emergency shelter operations, homeless prevention, rapid re-housing, Homeless Management Information System (HMIS), and grant administration.

#### 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 for \$1,800,000. The award has funded the *Preparing for Transit in the 21st Century* project which is preparing for six transit stations that will be built in Somerville. Somerville has completed a citywide comprehensive plan, is actively in the process of station area planning and implementation, re-writing the Somerville Zoning Ordinance, streamlining the permitting process, and creating a land bank for affordable housing. This project aligns with a significant ongoing planning effort and will bring back the rail access that Somerville was built on.

#### Anticipated Project Benefits:

- Planning for construction of a rail transit extension to Somerville and for associated transit-oriented development in the area.
- Creation of a land bank for affordable housing with a revolving fund to facilitate affordable housing into the future as new transit opportunities increase the costs of housing.

#### Project Highlights:

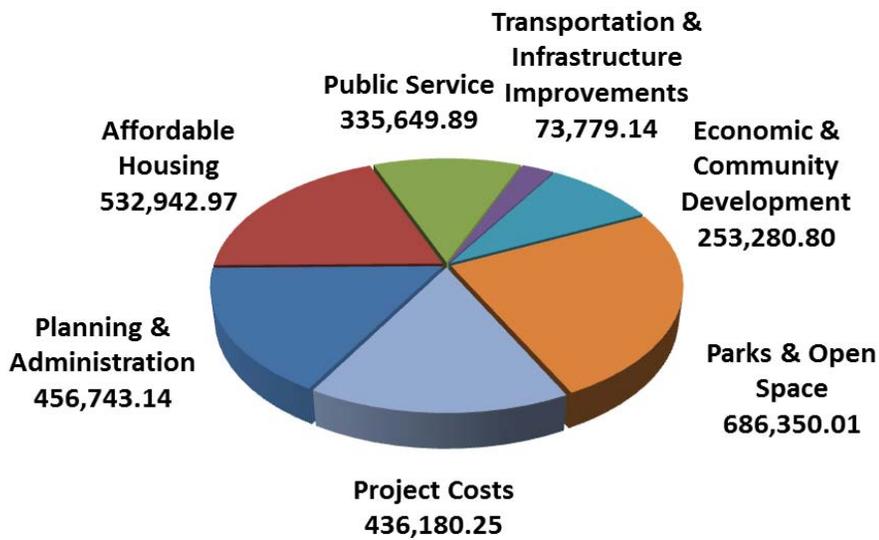
- *Create Location-Efficient, Inclusive Communities:* Funding will provide for creation of a land bank for affordable housing with a revolving fund.
- *Reduce Regulatory Barriers:* Project includes a complete re-write of Somerville's zoning ordinance that will identify measures to increase affordable housing.

*Core Partners:* Somerville Community Corporation, Somerville Arts Council, Somerville Transportation Equity Partnership, Community Corridor Planning, Somerville Chamber of Commerce, Union Square Main Streets, Affordable Housing Trust Fund, East Somerville Main Streets, Council on Aging, Somerville Housing Authority, Metropolitan Area Planning Council, Commission on Energy Use & Climate Change, Groundwork Somerville

**Overview**

In Program Year 2012-2013 the City of Somerville expended \$4,014,000 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 CDBG spending by category was as follows:

**City of Somerville 2012-2013  
CDBG Expenditure**



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

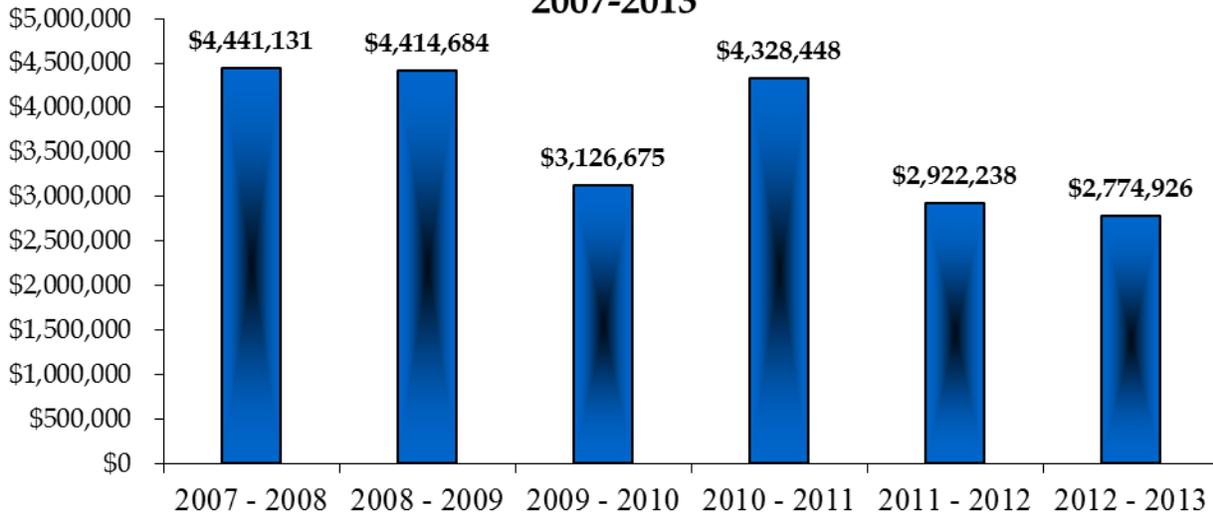
- 1) Economic & Community Development
- 2) Transportation & Infrastructure Improvements
- 3) Parks & Open Space
- 4) Affordable Housing
- 5) Public Service
- 6) Project Costs
- 7) Planning & Administration

The City's 2012-2013 CDBG entitlement funding from HUD was a decrease of 5.8% from the previous fiscal year of \$2,585,669.

**Organization of the Report**

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

**City of Somerville**  
**Fiscal Year Comparison | HUD CDBG Expenditures**  
**2007-2013**



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.”<sup>1</sup>

### ***HOME Funds:***

HUD describes the nature of these funds as providing “funds allocated using a formula designed to reflect relative housing needs”<sup>2</sup> 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 operations, street outreach, HMIS reporting and data collection, rapid re-housing, homeless prevention, and administration.

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

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

<sup>2</sup> 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. The final report and completed scope are expected to be finished by late 2013.

#### 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 2012: 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. Activity in June 2013 shows that the market's draw continues to grow.

#### 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 2012-2013. 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 “Relish”, and participated in key public policy decisions on issues ranging from the extension of the new zoning districts to key proposals in the square. Through these activities the main streets organization met several goals and accomplishments in program year 2012 including providing direct financial, technical, and micro-enterprise assistance to the local area businesses.

#### East Somerville Main Streets:

East Somerville Main Streets (ESMS) represents a public-private partnership between East Somerville residents, business owners, community advocates, the City of Somerville, and the National Main Street Center.

ESMS provides institutional support and business strategies to East Somerville residents and business owners to 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.

Fiscal Year 2012 marked East Somerville Main Streets’ seventh year as a young but mature organization, and demonstrated its continued success in revitalizing the East Somerville Neighborhood Strategic Revitalization Area (NRSA). Building upon the continued success, East Somerville Main Streets has successfully applied for and received a \$50,000 grant for the National Endowment for the arts, to continue cultural economic development in East Somerville. Fiscal Year 2012 represented an opportunity to revisit the activity’s levels of accomplishments, goals and performance measures in a systematic approach that responded to stakeholders reporting needs. The now implemented levels of programmatic services involved a branding a marketing program where 8 to 12 businesses were assisted in receiving on-site technical assistance on the fields of improving their customer base, marketing tactics and branding challenges. The largest activity (# 2: technical assistance program) reflected on needs identified in previous commercial district assessments and provided follow-up meetings to new and existing businesses with operational specific needs. Quarterly shared business owner meetings and 1-on-1 sessions to 24 businesses owners were provided. The Business Attraction and Recruitment Program allowed to generate a robust strategy to identify businesses opportunities in East Somerville and filled them in through business recruitment, but also providing counseling and information advisory to existing growing business.

#### Storefront Improvement Program:

The Storefront Improvement Program is a design-based programmatic approach to revitalize key business districts in Somerville by improving the exterior appearance and appeal of commercial shops while also enhancing the urban realm. At the same time, the SIP is intended to function as a public-private partnership, acting as an incentive for additional investment of private funds within the surrounding commercial districts.

The SIP provides a reimbursable matching grant for approved storefront improvements. These funds are allocated towards items such as the renovation or restoration of architectural details, the installation of energy efficient windows and entrance systems, removal of roll down grills, and the installation of signage, awnings and lighting for commercial properties in eligible census tracts in strategic geographic locations.

Fiscal Year 2013 provided the time and space to rethink the SIP activity on a more functional and integrated approach. The Program's structure was revisited and restructured to articulate and encourage economic opportunity, mobility and accessibility at the neighborhood level in manner consistent with the goals articulated in SomerVision, the City's Comprehensive Plan adopted in 2012. Thus, the SIP is shaped to blend the 'Somerville by Design philosophy', a methodology that combines community participation, place making and design, and public-private partnerships.

**PY12 2012-2013 Economic Development Accomplishments**

<b>Project</b>	<b>PY 12 Expenditure</b>	<b>Accomplishments</b>
Store Front Improvements	\$1,147.65	2 businesses assisted
Boynton Yard	\$47,681.49	Commercial and Industrial improvement activities completed in support of business development and job creation
East Somerville Main Streets	\$80,951.66	Technical and microenterprise assistance provided to local businesses
Union Square Main Streets	\$117,500.00	Technical and microenterprise assistance provided to local businesses
Union Square Farmers Market	\$6,000.00	Technical and microenterprise assistance provided to local businesses
<b>Total</b>	<b>\$253,280.80</b>	

**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 2012-2013 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 broken ground on the Broadway Streetscape project in the East Somerville NRSA. The final project will entail one travel lane in each direction, widened sidewalks with amenities, new bike lanes, and plaza areas at key nodes targeted for economic development. These amenities include approximately 140 new trees and 43 new street benches. The \$9 million project has been fully funded from multiple sources, and construction is anticipated to finalize in early 2014.

Accomplishments within the last year include the over 9 months of construction.

### Community Path:

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 is currently under construction with an anticipated opening date of spring 2014. During the fall of 2012, street improvement projects were completed along the community path.

<b>Project</b>	<b>PY12 Expenditure</b>	<b>Accomplishments</b>
East Broadway Streetscape	\$60,531.32	Completed activities required to complete sidewalk and street improvement projects currently underway
Community Path	\$13,247.82	Completed activities required to complete street improvement projects along the community path.
<b>Total</b>	<b>\$73,779.14</b>	

### **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 fall of 2012 88 trees were planted and 86 trees were planted in the spring of 2013. 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:

The newly located, renamed and rededicated Chuckie Harris Park (CHP) at 15-25 Cross Street was acquired with a State Grant from the Massachusetts Executive Office of Energy and Environmental Affairs (EOEEA). Since acquisition, a new park design was developed through a comprehensive community process and constructed was completed in June of 2013. CHP includes amenities such as play equipment, a rainwall that doubles as community movie screen, 7 new community garden plots, seating areas, and a rain garden that captures storm water. The park is completely ADA accessible and was funded through CDBG funds, and a second EOEEA State Grant. The park has become a focal point for the community and it is very much enjoyed by children, teens and adults. The community is creating a friends group to foster stewardship around it.

### North Street Veterans Playground

Landscape plans for the renovation of North Street Veterans Playground are complete, a contractor has been selected, and the renovation is underway. The new design was developed after a comprehensive community process and both design and construction funds were provided with a combination of CDBG funding, a State Grant, and City Bonds. Features of the new park include play areas for younger and older children, a water feature, planted hills, half-court basketball, a tennis backboard, a soccer and street hockey goal, new tree plantings, cafe seating, and a layout that will provide increased visibility and security.

### Quincy Street Park:

The City has completed the renovation of Quincy Street Park. This new design provides a natural wooded park space that maintains the "wild" qualities of the original neighborhood space, including native trees shrubs and bulbs, and has the new park has received much praise from the local community.

### Kemp Nut Park:

Completion of the Kemp Nut Park, which included the planned park expansion.

### **PY12 2012-2013 Parks and Open Space Accomplishments**

<b>Projects</b>	<b>PY 12 Expenditures</b>	<b>Accomplishments</b>
Street Tree Planting Program	\$150,634	174 trees planted
Harris Park	\$205,032	Completed
North Street Veterans Park	\$65,790	1 park underway
Quincy Street Park	\$229,560	Completed
Kemp Nut	\$34,703	Completed
PERRY PARK	\$630	Completed
<b>Total Parks &amp; Open Space</b>	<b>\$686,349</b>	

**Evaluation of Goals**

The City's Parks & Open Space program began to accelerate in PY08 and continues today. The City has completed 13 park projects since 2008.

**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 PY12, 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 \$1,283,229 of HOME and CDBG funds on housing programs and projects and has over \$115,535 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"> <li>o \$912,897.60 in HOME funds expended.</li> </ul>
<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"> <li>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 was completed and occupied in PY12 although no funds were expended.</li> <li>o \$53,397.60 in HOME funds expended with \$799,999.40 previously expended 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 was completed in PY12 and is fully occupied.</li> <li>o \$634,500 in HOME funds expended with \$70,500 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 currently under construction with an expected completion date and occupancy in early 2014.</li> <li>o \$225,000 in HOME funds expended with \$25,000 remaining committed for the construction and development of the Massachusetts Bay Veterans Center, a 22-unit transitional facility and 7 permanent rental housing unit project for veterans, at 1323 Broadway being developed by the Volunteers of America of Massachusetts. The project is currently under construction with an expected completion date and occupancy in Fall 2013.</li> </ul>		

<b>Program Name</b>	<b>Program Description</b>	<b>Funding</b>
Heating System Replacement Program	Provides homeowners a 0% interest deferred payment forgivable loan of up to \$4,500 to replace their inefficient heating system.	\$4,500 CDBG expended \$9,000 HOME expended \$4,500 CDBG in progress
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"> <li>○ 3 homes received a new heating system</li> <li>○ 1 heating system replacement in progress</li> </ul>		

<b>Program Name</b>	<b>Program Description</b>	<b>Funding</b>
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.	\$182,860 CDBG expended \$0 in HOME expended \$15,035 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"> <li>○ 8 new rehab loans provided ;16 rehab activities (26 units) completed</li> <li>○ 26 total units rehabilitated (this is comprised of 13 owner occupied units and 13 tenant occupied units in 16 structures)</li> <li>○ 20 low or moderate-income families assisted</li> <li>○ 11 elderly households assisted</li> <li>○ 8 female-headed households assisted</li> <li>○ 2 rehab loans in progress</li> <li>○ 13 rental units rent-restricted</li> <li>○ 6 units brought from substandard into compliance with HQS</li> <li>○ 4 units brought into compliance with Lead Safety rules</li> </ul>		

<b>Program Name</b>	<b>Program Description</b>	<b>Funding</b>
Tenant Based Rental Assistance	Rental assistance provided to assist homeless and at-risk individuals and families	\$56,987 HOME expended \$120,126 HOME in progress
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"> <li>○ 32 low-income households assisted</li> <li>○ 10 low-income young adults and 7 family households were stabilized</li> <li>○ 13 individuals and 7 families currently receiving assistance</li> <li>○ 21 female-headed households assisted</li> </ul>		

<b>Program Name</b>	<b>Program Description</b>	<b>Funding</b>
Homebuyer Assistance	Closing Cost and Down Payment assistance provided to low-income first-time homebuyers purchasing a home in Somerville	\$20,000 HOME expended
<p>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.</p> <ul style="list-style-type: none"> <li>o 4 households received Closing Cost Assistance</li> </ul>		

<b>Program Name</b>	<b>Program Description</b>	<b>Funding</b>
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.	\$396,832.41 Lead Hazard Reduction Demonstration Grant expended.
<p>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.</p> <ul style="list-style-type: none"> <li>o 11 new loans provided</li> <li>o 44 units abated</li> <li>o 44 low or moderate-income households assisted</li> <li>o 4 loans in progress</li> </ul>		

<b>Program Name</b>	<b>Program Description</b>	<b>Funding</b>
Preservation of Expiring Use Properties	Provides funding for a consultant to work to preserve expiring-use rental properties throughout City	\$0 CDBG expended
<p>The City of Somerville works with the Somerville Community Corporation to negotiate the preservation of expiring use properties throughout the City.</p> <ul style="list-style-type: none"> <li>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.</li> </ul>		

### **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 PY12, the Trust distributed \$55,000 in Housing Assistance Grants to seven (7) non-profit organizations in Somerville. In addition, the Trust provides a 0% interest, forgivable loans of \$3,500 each through the Closing Cost Program. In PY12 (Jan. 2012-Dec 2012), the Trust assisted five (5) low to moderate-income households in purchasing their first home through a forgivable loan for a total of \$17,500 expended in PY12 for Closing Cost loans through the Trust. In PY12, the Trust expended \$73,492.40 for the Tenancy Stabilization Program, to assist households at risk of homelessness. The Trust also expended \$95,000 to Somerville Community Corporation toward the development of Saint Polycarp Village Phase III, a 31-unit rental housing project, at the former site of the St. Polycarp Church property at 5 Memorial Road. The Trust also expended \$150,000 to Volunteers of America toward the development of veterans housing at 1323 Broadway, a 29-unit rental project for formerly homeless veteran households with supportive services. Twenty two units are for transitional rental housing and 7 units are for permanent rental housing.

#### 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 at least 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 or renters and monitors them to ensure affordability is maintained. In PY08, the Board of Aldermen 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 PY12, the City's Inclusionary Housing Program sold a total of six (6) condominiums to low and moderate-income households and completed the initial rent-up of twenty-seven (27) rental units to low-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 56 affordable rental units and 8 affordable homeownership units in PY12. 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 too 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 PY12, the City of Somerville Continuum of Care applied for funding for nineteen (19) renewal programs. All nineteen renewal programs were funded at the maximum level as shown below.

### Continuum of Care Programs

Organization	Program	Amount Funded
Heading Home	Better Homes 3	\$139,103.00
Somerville Homeless Coalition	Better Homes 2	\$430,900.00
Somerville Homeless Coalition	Better Homes	\$173,153.00
Wayside Youth and Family Support Network, Inc.	ShortStop THP	\$240,315.00
Catholic Charities	St. Catherine's Transitional Program	\$51,943.00
Somerville Homeless Coalition	Passages Case Management	\$198,316.00
CASPAR, Inc.	FirstStep Outreach	\$153,666.00
CASPAR, Inc.	Phoenix Center	\$83,052.00
CASPAR, Inc.	GEAR	\$116,630.00
Transition House	Family Development	\$14,341.00
Somerville Homeless Coalition	Passages Expansion	\$40,773.00
CASPAR, Inc.	Phoenix Expansion	\$39,883.00
Somerville Homeless Coalition	Shelter + Care	\$142,434.00
Somerville Homeless Coalition	Sobriety and Stability	\$139,410.00
Somerville Homeless Coalition	Sobriety and Stability II	\$243,075.00
Just a Start	Next Step	\$23,540.00
Heading Home	Somerville Stepping Stones	\$76,160.00
Somerville Homeless Coalition	Home for Good	\$9,717.00
Somerville Community Corp.	Temple/Mystic Apartments	\$17,888.00
	<b>TOTAL</b>	<b>\$2,334,299.00</b>

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, including the emergency shelter and transitional housing needs of the homeless population. Improvements to the system are suggested and implemented through this framework. In PY 2012, the Volunteers of America began the construction of 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 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, 88% 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 PY12, 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. The Fair Housing Commission has seen significant turnover recently, but the appointment of three new Commissioners, one employee of the Somerville Housing Authority, one local realtor, and one representative of a non-profit housing agency will ensure success in the future.

In addition, in PY12, the City had a graduate intern conduct an update to the Tenant's Helper: A Handbook for Renters. This included the creation of "Pull-out sheets" to easily provide information to residents on areas of particular interest, such as Protected Classes, Housing Codes, Financial Information, and Moving In and Out checklists. These materials will be translated into multiple languages for easy use and distribution to all Somerville populations.

#### 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. While a revision of the City Ordinance establishing the Fair Housing Commission may be useful in the future, increased efforts at recruitment have resulted in 3 new members being appointed to the Commission this 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.

On April 25<sup>th</sup>, the Housing Division and the Fair Housing Commission partnered with the Office of Somerville Commissions to sponsor a training on the topic of "LGBT Equal Access to HUD Programs." Speakers included representatives from MassEquality and HUD's Office of Fair Housing and Equal Opportunity, along with Commission members. All sub-recipients of HUD funds through the Housing Division were required to attend, and members of the housing advocacy community were invited 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. However, the training held on April 25<sup>th</sup> was a step in this direction to ensuring housing advocates and HUD subrecipients are aware of the Fair Housing Commission and fair housing laws.

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 worked with the Housing Division over the past year to update the Tenant's Helper Handbook, including creation of "pull-out sheets", to easily provide information to residents on areas of particular interest, such as Protected Classes, Housing Codes, Financial Information, and Moving In and Out checklists. These materials will be translated into multiple languages for easy use and distribution to all Somerville populations.

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 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: On April 25<sup>th</sup>, the Housing Division and the Fair Housing Commission partnered with the Office of Somerville Commissions to sponsor a training on the topic of "LGBT Equal Access to HUD Programs." Speakers included representatives from MassEquality and HUD's Office of Fair Housing and Equal Opportunity, along with Commission members. All sub-recipients of HUD funds through the Housing Division were required to attend, and members of the housing advocacy community were invited as well.

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 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. Final payments were made on this project in PY12.
- 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 currently under construction and will be ready for occupancy in early 2014.
- Cross Street: an 8-unit rental project for formerly homeless low-income households with supportive services. This project was completed and began occupancy in Fall 2012.
- 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 is under construction and will be complete and ready for occupancy in the fall of 2013.
- SHA WaterWorks: a 25-unit Senior Housing Development being proposed by the Somerville Housing Authority in the former MWRA WaterWorks building. The City has made a conditional commitment of \$500,000 in HOME funds to the SHA for the development of this project.
- 181 Washington Street: a 35-unit affordable rental project on the site of the former Boys and Girls Club being developed by the Somerville Community Corporation. The City has made a conditional commitment of \$600,000 in HOME funds to the SCC for the development of this project.

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. While zoning has not been identified as a barrier to affordable housing, it is viewed as a tool that can be used to increase the creation of new affordable units.

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 PY12 and is available online as well, and includes "pull-out sheets", to easily provide information to residents on areas of particular interest, such as Protected Classes, Housing Codes, Financial Information, and Moving In and Out checklists. These materials will be translated into multiple languages for easy use and distribution to all Somerville populations.

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. In addition, the City has recently hired Language Liaisons serving residents who speak Spanish, Portuguese and Haitian-Creole. Housing Division has begun work with the Language Liaisons to ensure that materials are translated and distributed to non-English speakers and translation services are available at public meetings and events.

#### **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

As described in detail above, the City continues to make progress towards these goals in PY12, including the creation of 82 new affordable units at Saint Polycarp's Phases I and II and the Massachusetts Bay Veterans Center. The City also continued to make progress towards the creation of housing for the chronically homeless through the occupancy of 8 units at 75 Cross Street in November 2012, and the ongoing efforts of the Continuum of Care; In addition, both SPV II and III will include permanent affordable units for the chronically homeless. The Housing Rehab Program, Heating System Replacement Program and Lead Abatement Program continue to make strides towards rehabilitating Somerville's housing stock and making it safer while simultaneously creating affordable rental opportunities. The City has also made progress towards increasing homeownership through the Closing Cost Assistance Program and the City's Inclusionary Housing Program.

### **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 reinforcement incentives. 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 bright future and were afforded the opportunities to be normal kids challenged to do extraordinary things. One hundred and three students participated in the after-school program; nearly 90% were from very low income families.

### **Teen Health Advisory Cambridge Public Health:**

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. Three teens organized various monthly, health related education activities and events for their fellow classmates.

### **Support and Stabilization Services CASPAR:**

Community-based support services were provided to help 150 addicted individuals meet their basic needs and once stabilized to receive services linked to recovery and self-sufficiency. Staff provided 1 on 1 case management, group intervention and referral to substance abuse, medical and mental health services and access to day drop in center. 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 who were living on the streets.

### **Green Team Groundwork Somerville:**

Fourteen teens were hired for a summer, job readiness program promoting urban agriculture, green job opportunities by maintaining and harvesting gardens, collecting compost, organizing workshops in schoolyard gardens and promoting 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, hosting activities along to river and parks, learn to care for a garden, develop entrepreneurial skills at the Farmers Market, job training and conservation techniques.

### **Early Intervention Riverside/Guidance Ctr:**

CDBG funds provided early intervention services for 70 low income infants with developmental delays between 0-36 months. The agency stressed prevention and therapeutic intervention in home visits to maximize access, encourage independence and knowledge of services. 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 70 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 young mothers with the knowledge and life skills necessary for independent living. Eleven 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 Speakers:

CDBG funded a case manager who provided culturally and linguistically competent assistance to 78 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 residents 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 and weekend 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 connection with legal, medical and other essential social services. Over two thousand 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.

#### Empowering Competent 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. Fourteen low income youth received job readiness training and obtained peer leadership training while providing sixty 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. 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.

Transportation for Elderly and Disabled Residents 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 350 seniors and disabled residents by providing community-based transportation to help residents maintain healthy mobile and connected lives. Transportation was offered to doctors' appointments (over 2,000 trips), grocery stores (over 100 trips) and local Council on Aging events. 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. Two hundred and eighty-five conflicts were resolved and sixty-two interventions were conducted involving over 700 students. 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 and education and support services to avoid recurrence to homelessness. 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 1,500 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 2,000 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 of 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 provided families with housing prevention information.

Boxing Club Somerville Youth and Boxing:

CDBG funded a school outreach program to raise awareness about the benefits of cross training and boxing. Twenty-two youth participated in the program, three were referred by the Police Department and eight were special education teens. This program addressed the City's 5 Year Plan by providing programming to promote substance abuse and gang prevention strategies, to support healthy lifestyles and to engage and include persons with disabilities.

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. Two groups of eight 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 44 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 Center for 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-eight low income youth were involved in the leadership training. This program addressed 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 forty households 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.

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 175 non-English speakers, 31 enrolled in "Helping your Child in School" classes, 8 bi-lingual youth provided interpretation assistance at meetings and gained knowledge on issues to discuss with their families and social

networks and 15 youth participated in after school tutoring. 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.

Art Without Walls Somerville 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 (70 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. Twenty low and moderate income youth were trained in drug prevention strategies and health risks associated with drug use to help peers to make informed decisions about their substance abuse. 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 for elderly residents 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 200 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 2012 for the July 2013 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 for the program, the number of clients to be served with the budget and the timeline to accomplish that end. 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 2012 through June 2013 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 live healthy and productive lives; 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 ten 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 FY12, 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. Income and ethnicity client data was collected on just under 4,000 residents. The results of the data show that 56 percent of the clients served were extremely low income and 43.5% were low income. The table below summarizes the data collected.

<b>Demographic</b>	<b>Number of Clients</b>
White	2,271
Black/African American	864
Asian	160
American Indian	5
Black/African American & White	67
Other	628
<b>SubTotal</b>	<b>3,995</b>
<b>Income Profile</b>	<b>Number of Clients</b>
Extremely Low Income	2,255 (56%)
Low Income	1,740 (43.5%)
<b>SubTotal</b>	<b>3,995</b>

In FY12, the program was able to fund 25 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 Accomplishments**

The City of Somerville received \$223,912 in ESG funds. Through a Request for Proposal, six agencies received funding for 2012-2013. Contracts were negotiated with detailed eligibility requirement, numbers of clients to be served and budgets for the expenditures of funds. Approximately 52% of the funds were awarded to agencies providing Street Outreach and Shelter Operations – to engage/assist persons living on the streets and to provide support and resources to enable sheltered resident to find sustainable housing. Approximately 22.7% of the funds were awarded to agencies providing Homeless Prevention services to residents at-risk of losing their housing due to eviction, rent arrears, etc. Approximately 15% of the funds were awarded to agencies to Rapid Re-House homeless persons. Approximately 2.8% of the funds awarded for HMIS training, data quality checks and reporting leaving approximately 7.5% for ESG administration.

### **ESG CASPAR 24 Hour Services for Active Substance Abusers**

Proposed serving 107 active substance abusers living on the streets.

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. Lifesaving services were offered 24 hours a day to include street outreach, basic services (food, clothing, sleeping accommodations, and personal hygiene supplies) and specialized services as needed, such as medical care, mental health screening/assessment, case management, substance abuse counseling and treatment referral. One hundred and sixty-seven Somerville residents received services. Working with a housing specialist from Homestart, 47 people struggling with substance abuse were placed in permanent housing. 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 and essential linkage to treatment programs within CASPAR's continuum of care.

### **ESG Catholic Charities Emergency Outreach**

Proposed street outreach and support for 41 women living on the streets.

Catholic Charities provided emergency street 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 Community Action Agency of Somerville (CAAS) Homelessness Prevention and Rapid Re-Housing**

Proposed serving 36 clients through Homelessness Prevention and 3-4 through Rapid Re-Housing.

The agency provided eviction prevention services to at-risk residents. Bi-lingual advocates have served 54 households (133 individuals) with legal advice, information and support

defending against eviction, helping households stabilize in place or find a new and more appropriate housing setting. All households served were very low income. CAAS addressed the City's Goals by preventing and addressing homelessness by providing timely intervention in the eviction process and assisting at-risk clients to stay in their homes by resolving disputes with landlords or by helping them move to more affordable housing.

#### ESG Respond Shelter Operation and Rapid Re-Housing Services for Battered Women & their Families

Proposed sheltering 80 clients and providing 80 clients with housing relocation and stabilization services.

Respond provided a safe, confidential shelter for 70 individuals (35 adults and 35 children) including providing emergency shelter, advocacy and support services for survivors of domestic violence and their children who sought refuge from domestic violence; 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 search and advocacy, helped participants to access housing stabilization funds and/or apply for public housing, public assistance and job search services. Through agency partnership, clients have found permanent housing faster and connected with agencies for long-term services to maintain residency. Average length of stay at the shelter was four months. Fifty percent of departing residents moved in permanent housing or longer-term transitional housing programs. 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 Shelter Operations, Rapid Re-Housing, Homelessness Prevention and HMIS Reporting

Proposed sheltering and providing essential services to 20 families and 60 adults, re-housing 25 clients, providing homelessness prevention services to 40 clients and conducting training in HMIS reporting.

The agency operated two shelters and housed 104 people, including 29 children. The family shelter met the critical needs of 20 families with 29 children. The individual shelter assisted 55 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 chance to live healthy and productive lives despite their homeless situation and meeting everyone's most basic needs. The agency

provided financial assistance and services to enable 24 “homeless” individuals move into permanent housing. Transition into independent living for the clients has been successful and they continue to be stably housed. However, it continues to be challenging to find eligible clients ‘literally homeless from Somerville’ at the time of application) and/or to find affordable housing for homeless clients to access. Through Homelessness Prevention, the agency has assisted 86 individuals (including 134 children) transition to independent living by providing financial assistance with security deposits, rental arrears, utility arrears, first month’s rent and hotel stay for fire victims. Through HMIS Data Collection and in conjunction with the Continuum of Care, the agency has hired a consultant to assist with HMIS training, data collection, data quality and reporting.

#### ESG Transition House Homelessness Prevention

Proposed prevention services for 60 residents.

Homeless prevention services of at least one kind were accessed by 40 households (all 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 and promote housing stabilization. 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 now able to retain permanent housing.

PUBLIC SERVICES GRANT

	<b>Prior year's projects carried forward</b>	<b>PY12 Expenditures</b>	<b>PY</b>	<b>Balances remaining</b>	<b>Accomplishments</b>
PS	COUNCL ON AGING- WELLNESS PROGRAM	\$3,018.88	2010	\$8,893.40	100 seniors served
	<b>Projects</b>	<b>PY12 Expenditures</b>	<b>PY</b>	<b>Balance Remaining</b>	<b>Accomplishments</b>
PS	HEALEY CLUB BOYS & GIRLS CLUB 5 MEACHAM ST, SOMERVILLE	\$8,700.38	2012	\$0.00	103 youth served
PS	SUBSTANCE SUPPORT CASPAR 5 MIDDLESEX AVE, SOMERVILLE	\$5,000.00	2012	\$0.00	150 people served
PS	HLTH ADVISORY SOM HOSPITAL 91 HIGHLAND AVE, SOMERVILLE	\$3,000.00	2012	\$0.00	3 teens trained
PS	YTH ORGANIZING TN EMPOWERMT 165 BROADWAY, SOMERVILLE	\$72,000.00	2012	\$18,026.00	28 low income youth enrolled
PS	YOUTH BOXING CLUB, 11 OTIS STREET, SOM	\$5,000.00	2012	\$0.00	22 children served
PS	GREEN TEAM GROUNDWORK SOM 21 PROPERZI WAY, SOMERVILLE	\$4,500.00	2012	\$0.00	14 teen jobs created
PS	EARLY INTERVENTION GUIDANCE CTR 61 MEDFORD ST, SOMERVILLE	\$4,500.00	2012	\$0.00	70 low income infants served
PS	ESOL CLASSES HAITIAN COALITION 268R POWDERSHOUSE BLVD, SOMERVILLE	\$8,497.83	2012	\$0.00	70 low income participants
PS	MENTOR AFTERCARE JUST-A-START 114 TEMPLE STREET, SOMERVILLE	\$4,250.00	2012	\$0.00	funded 11 mentors
PS	SOCIAL SVCS MAPS PORTUGUESE 1046 CAMBRIDGE ST, CAMBRIDGE	\$5,000.00	2012	\$0.00	78 low income Portuguese speakers served
PS	EMPOWER YOUTH MYSTIC LEARNING 530 MYSTIC AVE, SOMERVILLE	\$15,500.00	2012	\$0.00	65 low income youth enrolled
PS	24 HR HOTLINE RESPOND PO 555, SOMERVILLE	\$17,466.71	2012	\$0.00	2,000 + callers assisted
PS	ELDERLY TRANSPORTATION SCM 167 HOLLAND ST, SOMERVILLE	\$62,500.00	2012	\$5,208.37	350 seniors served
PS	SCHL MEDIATION SOM COM CORP 91 HIGHLAND AVE, SOMERVILLE	\$8,497.83	2012	\$0.00	285 conflicts with 820 students
PS	BETTER HOM SOM HOMELESS COAL 1 DAVIS SQUARE, SOMERVILLE	\$6,637.10	2012	\$0.00	12 individuals served
PS	PROJ SOUP SOM HOMELESS COAL 15 FRANKLIN STREET, SOMERVILLE	\$60,362.10	2012	\$0.00	1,500 individuals served
PS	VOL/RES CTR SOM HOMELESS COAL 1 DAVIS SQUARE, SOMERVILLE	\$8,073.88	2012	\$0.00	2,000 calls answered
PS	OUTREACH PROGRAM YMCA 101 HIGHLAND AVE, SOMERVILLE	\$6,147.26	2012	\$0.00	program underway
PS	CIT/LIT SUMMER JOBS YMCA 101 HIGHLAND AVE, SOMERVILLE	\$21,244.57	2012	\$0.00	44 low income youth trained
PS	STEP UP ED WELCOME PROJECT 530 MYSTIC AVE, SOMERVILLE	\$7,800.00	2012	\$0.00	175 immigrant non English speakers trained
PS	WELLNESS PROGRAM COUNCIL ON AGING 167 HOLLAND ST., SOMERVILLE	\$16,136.00	2012	\$12,673.60	program underway
PS	PUBLIC ART ARTS DEPARTMENT 50 EVERGREEN AVE, SOMERVILLE	\$8,328.25	2012	\$0.00	7 youth jobs created, 70 children summer program.
PS	SPF100 SOM CARES HEALTH DEPT 50 EVERGREEN AVE, SOMERVILLE	\$8,497.83	2012	\$0.00	20 youth participated
		<b>\$335,649.89</b>		<b>\$50,948.63</b>	

## EMERGENCY SOLUTIONS GRANT

	Projects	PY12 Expenditures	PY	Balances Remaining	Accomplishments
ESG	STREET OUTREACH CASPAR 5 MIDDLESEX AVE., SOMERVILLE	\$15,843.76	2012	\$5,156.24	167 served
ESG	STREET OUTREACH CATHOLIC CHARITIES 270 WASHINGTON ST., SOMERVILLE	\$11,500.00	2012	\$0.00	192 women served
ESG	HOMELESS PREVENTION CAAS 66-70 UNION SQUARE, SOMERVILLE	\$7,500.00	2012	\$2,500.00	Underway
ESG	RAPID RE-HOUSING CAAS 66-70 UNION SQUARE, SOMERVILLE	\$0.00	2012	\$5,000.00	Cancelled
ESG	SHELTER OPERATIONS RESPOND PO BOX 555, SOMERVILLE	\$25,500.00	2012	\$0.00	70 persons served
ESG	RAPID RE-HOUSING RESPOND PO BOX 555, SOMERVILLE	\$5,000.00	2012	\$0.00	50% departing moved into permanent on longer-term transitional housing
ESG	SHELTER OPERATIONS SOM HOMELESS COALITION 1 DAVIS SQ., SOMERVILLE	\$58,000.00	2012	\$0.00	104 individuals sheltered
ESG	HOMELESS PREVENTION SOM HOMELESS COALITION 1 DAVIS SQ., SOMERVILLE	\$32,572.50	2012	\$5,452.50	52 people assisted
ESG	RAPID RE-HOUSING SOM HOMELESS COALITION 1 DAVIS SQ., SOMERVILLE	\$14,240.93	2012	\$9,595.07	21% moved to permanent housing
ESG	HMIS SOM HOMELESS COALITION 1 DAVIS SQ., SOMERVILLE	\$5,040.00	2012	\$1,260.00	training conducted
ESG	HOMELESS PREVENTION TRANSITION HOUSE 32 KENT ST., SOMERVILLE	\$3,000.00	2012	\$0.00	40 households assisted
ESG	ADMINISTRATION OSPCD 93 HIGHLAND AVE., SOMERVILLE	\$16,537.69	2012	\$213.31	Staff reimbursement
		<b>\$194,734.88</b>		<b>\$29,177.12</b>	

### **Emergency Solutions Grant**

Emergency Solutions Grant funds were awarded primarily for street outreach, shelter operation expenses, homeless prevention, rapid re-housing and HMIS 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, homelessness prevention for at-risk residents and rapid re-housing for literally homeless persons and HMIS data collection and grant administration. 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 local service agencies working with at-risk residents in conjunction with the Somerville Homeless Providers Group. They began working together on a Boston Foundation homelessness prevention grant which has been funded, has organized annual fundraisers that assist at-risk residents with financial assistance and has secured additional homeless prevention funding from the Metro Boston Regional Network. 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 best ways to allocate the Emergency Solutions Grant funds and address the City's 5 year goals. The Continuum of Care assisted 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 Grant 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 2012	Awarded	Eligible Activity	Match
CASPAR Inc 5 Middlesex Ave	\$21,000	Street Outreach	22K MIT in-kind, 4.6K annual appeal
Catholic Charities 270 Washington St	\$11,500	Street Outreach	13K OHCD (formerly DTA), 6.5K Cambridge Com Foundation, 2K Citizen's Energy;
CAAS 66-70 Union Sq.	\$10,000 \$5,000	Homeless Prevention Rapid Re-Housing	179K Community Service Block Grant
Respond Inc P O Box 555	\$25,500 \$5,000	Shelter Operations Rapid Re-Housing	150K Dept of Children & Families
Somerville Homeless Coalition 1 Davis Square	\$58,000 \$38,025 \$23,836 \$6,300	Shelter Operations Homelessness Prvnt Rapid Re-Housing HMIS	465.5K DTA, 23.5K donations/events, 19.8K Emergency Food & Shelter Program, 12.6K events, 62.7K United Way, 14K AHTF (PASS)
Transition House 32 Kent Street	\$3,000	Homelessness Prevention	18.6K Kent St Housing Project, 14K US Dept Housing
Administration 93 Highland Ave	\$16,751	Administration	16.7K CDBG
	\$223,912		\$1,024,500

### Evaluation of Goals

Requests for Proposals were advertised in April 2012 for the July 2013 contract year. Responders were asked to identify how their proposed program addressed the City's 5 Year Consolidated Plan. Additional questions responded to in the RFP included describing how the sub-recipients will meet the ESG national objective, will encourage participation of homeless persons in agency policy-making functions, will guarantee confidentiality of records of participants, and will substantiate the need for the proposed activity. 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 eligible budget, category and the timeline for successful completion of goals. 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 was collected on clients; the overall majority of the clients 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 and Emergency Solutions Grant funds are an integral part of the fabric of the community. These funds enable social service organizations to leverage and garner other funds. Most of the CDBG Public Service and ESG funds committed for FY12 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 2012-13 the City of Somerville expended almost \$1,044,339 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	\$ 15,000
Special Housing Projects	\$ 199,762
Tenant Based Rental Assistance	\$ 39,175
CHDO Projects	\$ 674,501
CHDO Operating Expenses	\$ 42,521
Administration Expenditures	\$ 73,380

During 2012-13, the City expended almost \$70,447 of HOME Program Income (PI) to assist housing activities. These expenditures included the following:

Housing Rehab	\$ 9,000
Down Pmt & Closing Cost Assistance	\$ 5,000
Special Housing Projects	\$ 25,238
Tenant Based Rental Assistance	\$ 17,812
CHDO Projects	\$ 13,397

Combined, this \$1,044,339 of HOME grant and \$70,447 of HOME Program Income PI funds assisted 9 completed and 2 in-progress activities during the 2012-13 reporting period.

The Administrative expenditures funded salaries, associated benefits, and other overhead costs to administer the HOME funded programs in 2012-2013.

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 7 families, and 25 young adults between the ages of 18 and 22, with rental assistance which assisted their transition to permanent housing.

The CHDO Project expenditures of \$687,897 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 100% complete and construction of the St. Polycarp Village Apartments Phase 3 is in progress.

The Special Projects expenditures of \$225,000 represents the City's current year contribution to the construction of the Massachusetts Bay Veterans Center, a 22-unit transitional facility and 7 permanent rental housing units project for veterans at 1323 Broadway. The project is 62% complete with occupancy in Fall 2013. The project created 4 handicap accessible units.

Households and Persons Benefitting:

A breakdown of the HOME-assisted activities completed during the 2012-13 reporting period results in 2 homeowner household, 4 homebuyer households and 51 tenant households. The 2 homeowner households were white at 80% AMI, the 4 homebuyer households were 1 Asian at 80% AMI and 3 were categorized as other at 80% AMI, 1 was Hispanic-Latino. Of the 51 tenant households, 19 were white, 29 were black-Afro-American, 2 were Asian, 0 were native American, native Alaskan, or Hawaiian or Pacific Islanders, 1 was categorized as other, and 13 were Hispanic-Latino. Forty-nine (49) tenant households were at 30% AMI, 1 was at 50% AMI, and 1 was at 60% AMI.

Overall in 2012-13, HOME assisted 57 households: 21 were white, 29 were black, 3 were Asian, and 4 were categorized as other; out of these 57 households 14 were Hispanic-Latino. Of these 57 households, 30 were 1-person households, 12 were 2-person households, 10 were 3-person households, 4 were 4-person households, 1 was a 5-person household and 0 were 6-person households; 30 heads of household were single, non-elderly persons, 1 head of household was elderly, 18 households were single parent households, 6 households were two parent households, and 2 households were characterized as other. Thirty-two (32) households were female-headed and 2 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 2012-13 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 and one (1) acquisition activity where construction was completed during the current CAPER period, \$557,553 in contracts and subcontract went to six (6) Women-owned businesses; \$0 went to Asian-owned businesses, \$0 went to Black/non-Hispanic-owned businesses, and \$324,421 went to four (4) 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 two (2) housing development activities completed during the current CAPER period, 75 Cross Street Apartments, an 8-unit rental project for homeless households, filled vacancies through contact with local homeless housing service organizations, the local housing authority, the Metropolitan Boston Housing Partnership, and listing on Boston Fair Housing Commission's Metrolist . St. Polycarps Phase 2, a 29-unit rental project, filled vacancies through advertisement in area newspapers, local newspapers, minority newspapers, flyers, banners, and contact with area community groups and the local housing authority 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.

75 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 four (4) HOME First-time Homebuyer Down Payment and/or Closing Cost Assistance activities and one (1) HOME rental activity 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
480 Mystic Avenue (SPVAIL)			\$1,134,890	0	0
60 Clyde Street #D3-6		\$5,000		0	0
28B Weston Avenue		\$5,000		0	0
17 Ivaloo Street		\$5,000		0	0
31B Weston Avenue		\$5,000		0	0
<b>Total: 1,154,890</b>		<b>\$20,000</b>	<b>\$1,134,890</b>		

#### Timely Commitment and Expenditure of Home Funds:

As of June 30, 2013, 95.53% of 2011 HOME funds were committed to eligible activities including required reservations for Community Housing Development Organizations (CHDO), and 100% of 2008 HOME funds were disbursed.

#### **HOME Fund Expenditure**

HOME Grant	Required Commitments	Committed as of 6/30/2013	Required Expenditures	Expended as of 6/30/2013	Required Commitments to CHDO	Committed to CHDO as of 6/30/2012
2011	\$16,378,449	\$15,645,773			\$2,456,767	\$6,363,190
2008			\$13,598,970	\$15,344,360		

#### Energy Star Units:

Of all newly constructed/gut rehab housing units completed and underway during the period 07/01/12 to 6/30/13

Total no. of units completed	37	Total no. of units underway	31
No. Energy Star qualified	8	No. to be Energy Star qualified	31
% Energy Star	22%	% Energy Star	100%

There are 31 units of new construction that are awaiting Energy Star rating certification in the St. Polycarp Village Apartments Phase 3 at 3 Memorial Road. The 8 new construction units in Cross Street Supportive Housing at 75 Cross Street received a 5+ star Energy Star rating. The 29 new construction units in St. Polycarp Phase 2 could not be Energy Star rated because the building is more than 3 stories and units do not have heating systems in each unit.

#### **Planning & Administration**

The City remained within its cap of 20% of CDBG funds for various planning, administration, and capacity-building activities for 2012-2013. Planning & Administration expenses totaling \$456,743.14 represents 16.84% of the City's 2012-2013 entitlement grant of \$2,435,932 and program income of \$276,566.

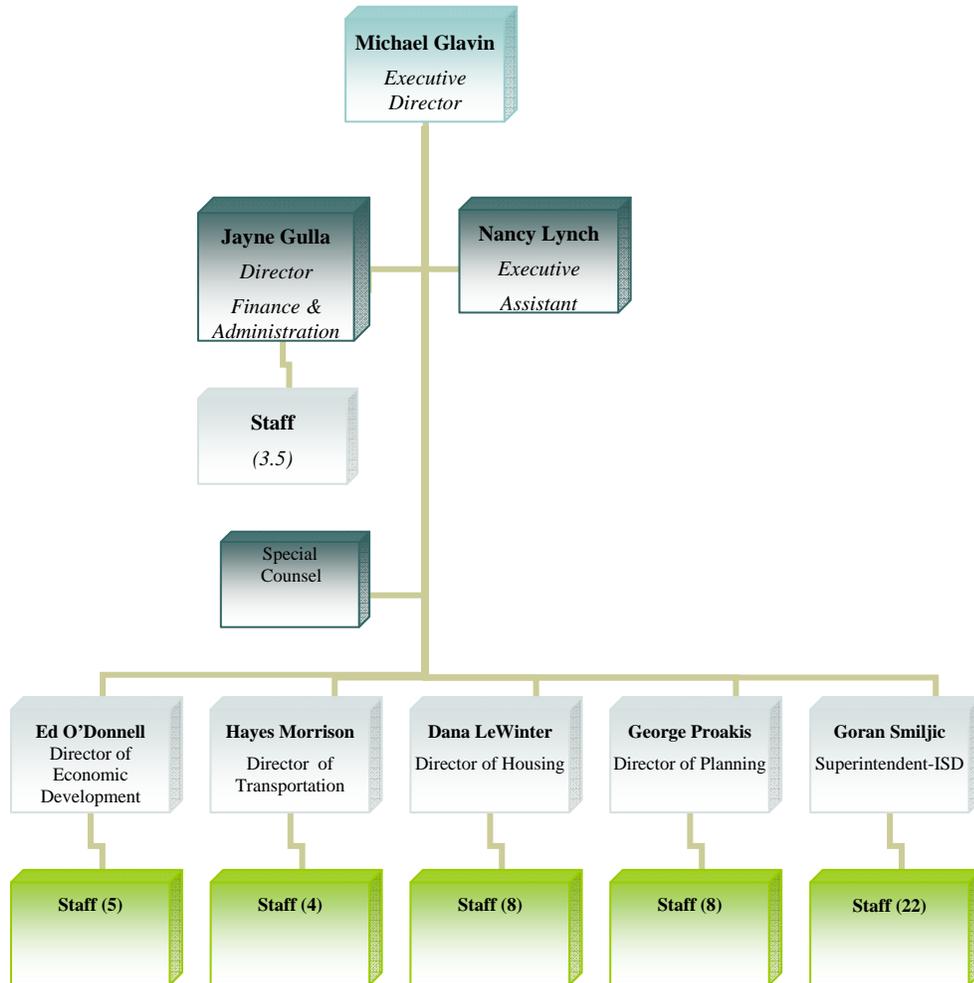
#### **Community Development Project Costs**

In direct support, management and supervision of the various funded projects and activities, the City expended a total of \$436,180 in CDBG funds. Project delivery includes wages and associated fringe benefits for this work

## 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, the Somerville Housing Authority 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 needed.

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 2012-2013, 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. The City continues to make progress towards its 5 Year Goals towards its Housing 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 2012-2013, 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 2012-2013 program year no substantive changes were made to the program objectives laid out in the 2012-2013 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 2012-2013, the City of Somerville expended funds in the furtherance of the 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:

<b>PY12 Expenditures Meeting National Objective</b>	
Total 2012-2013 CDBG Expenditures	\$2,318,183
Total Program Administration	\$456,743
Total Subject to Low/Mod Benefit Calculation	\$1,643,541
% PY11 Expenditures Meeting National Objective	70.90%

#### **Relocation**

In program year 2012-2013, 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 2012-2013, Program Income was generated in the following categories:

#### **PY12 Program Income**

<b>Program</b>	<b>Funding Source</b>	<b>Amount</b>
Housing Rehab Loans	CDBG	\$363,548
Housing Rehab Loan Service Fees	CDBG	\$2,371
<b>Total CDBG Program Income</b>	<b>CDBG</b>	<b>\$365,919</b>
Housing Rehab Loans	HOME	\$37,225
Homebuyer CCA Loans	HOME	\$2,000
Housing Development Loans	HOME	\$6,324
<b>Total HOME Program Income</b>	<b>HOME</b>	<b>\$45,549</b>

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 PY12 Housing Loans FORGIVEN 7/1/12 - 6/30/13**

<b>Program</b>	<b># of Loans</b>	<b>Principal Balance</b>
CDBG Loans	4	\$48,250
HOME Loans	8	\$38,000
LEAD Loans	11	\$202,795
LHRD Loans	15	\$305,320
SAHTF Loans	7	\$31,000

**TABLE ## PY12 Housing Loans OUTSTANDING 7/1/12 - 6/30/13**

<b>Program</b>	<b># of Loans</b>	<b>Principal Balance</b>
CDBG Loans	133	\$2,951,508
HOME Loans	107	\$8,658,952
LEAD Loans	8	\$138,527
LHRD Loans	40	\$922,042
SAHTF Loans	107	\$1,663,436

**TABLE ## PY12 Housing Loans NEW 7/1/12 - 6/30/13**

<b>Program</b>	<b># of Loans</b>	<b>Principal Balance</b>
CDBG Loans	8	\$156,405
HOME Loans	8	\$984,000
LEAD Loans	0	\$0
LHRD Loans	8	\$161,144
SAHTF Loans	9	\$269,500

**TABLE ## PY12 Housing Loans PAID 7/1/12 - 6/30/13**

<b>Program</b>	<b># of Loans</b>	<b>Principal Balance</b>
CDBG Loans	18	\$365,919
HOME Loans	5	\$45,549
LEAD Loans	1	\$4,790
LHRD Loans	1	\$8,900
SAHTF Loans	1	\$62,015

**HUD Neighborhood Revitalization Strategies**

The City of Somerville continues to make progress in its effort to revitalize two important Neighborhood Revitalization Strategy Areas (NRSA's): 1) East Somerville, and 2) Union Square.

**East Somerville**

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. In program year 2012, the City of Somerville completed a number of activities that continue to work towards the goals established for the revitalization of this designated area. Specifically projects were completed in the area's of affordable housing, parks and open space improvements, infrastructure improvements, and economic development. The table below measures the accomplishments made over the past program year when compared against the original planned goals.

<b>Objective/Outcome</b>	<b>Source of Funds</b>	<b>Performance Indicator</b>	<b>5 Year Plan Goals</b>	<b>PY 2012 (NRSA Yr 4) Accomplishment</b>	<b>5 Year Benchmark Progress</b>
<b>Improve the affordability of Decent Affordable Housing</b>					
Improve inclusionary housing requirement for residential development	N/A	Number of affordable units created	5 units in 3 years and 25 units in 5 years	79 units permitted 24 under construction. No change in zoning requirements	Inclusionary zoning ordinance increased to 15% See additional progress below
Increase City Linkage for affordable housing	Private	Fee /psf	Increase linkage fee to \$3 / psf within 3 years	Nexus Study completed. Increase in residential linkage rate to \$5.15 / psf proposed. See additional progress below.	Residential rate increase proposed and submitted to the Board of Alderman. See additional progress below
Encourage generation of housing stock that is affordable by design and consistent with the neighborhood	HOME	Number of affordable units created	10 new private, non-subsidized units in 3 years and 20 in 5 years	Completed Cross Street Supportive Housing. An 8 unit rental project for formerly homeless low-income households	Completed Cross Street Supportive Housing an 8 unit rental project for formerly homeless low-income households
Sponsor renovation of	CDBG	Number of	5 units in 3	Rehabilitated 2	Rehabilitated

existing housing that is affordable	LEAD	units renovated	years and 10 units in 5 years	units and lead abatement for 18 units	13 properties and lead abatement for 25 properties
<b>Improve the Sustainability of a Suitable Living Environment</b>					
Renovate existing parks in East Somerville	CDBG	Number of parks renovated	1-2 parks in 3 yrs and 3-4 parks in 5 yrs	1 park completed	1 park completed
Increase the Tree Canopy	CDBG	Number of trees planted	Expand tree canopy	42 trees planted	113 trees planted
Improve attractiveness of East Broadway Corridor	CDBG	Number of streetscape improvements	Complete design & streetscape within 5 years.	Underway	Underway
<b>Objective/Outcome</b>	<b>Source of Funds</b>	<b>Performance Indicator</b>	<b>5 Year Plan Goals</b>	<b>PY2012 (NRSA Yr 4) Accomplishment</b>	<b>5 Year Benchmark Progress</b>
<b>Increase the Availability/Accessibility of Economic Opportunities</b>					
Support East Somerville Businesses through Storefront Improvement Program	CDBG	Number of storefronts improved	1-2 Storefronts within 3 years and 4-5 within 5 years	Completed East Somerville Storefront Program. Launching in 2013.	10 storefronts improved
Strengthen public/private partnerships	CDBG	Number of Businesses assisted	30 member businesses within 5 years	2 businesses assisted	27 businesses assisted
Support East Somerville small businesses through development educational services for low and moderate income businesses	CDBG	Number of businesses assisted	Run workshops and/or training for 15 businesses in 3 years and 30 businesses in 5 years	None	3 business

East Somerville Additional Progress

The city of Somerville has made significant progress on a number of the goals that were established for the East Somerville NRSA. Specifically, the city has made a number of achievements related to housing that will have a long term impact on the availability of affordable housing in the area

- Inclusionary Housing Zoning Ordinance – New zoning passed in 2010 for East Broadway changed most of the corridor from RC to CCD45, CCD55, TOD55 and TOD70. While the Inclusionary Housing Ordinance requires 12.5% of units be made affordable in most zoning districts, TOD55 and TOD70 have an inclusionary housing requirement of 15%. Since its inception, the Somerville Inclusionary Housing Ordinance has created 6 units of affordable housing in East Somerville. However, due to the downturn in the housing market during those years, this was a result of the slow housing development market. Current approved housing developments in East Somerville will bring 629 new housing units, with 79 of them affordable to income-eligible households.
- Linkage Fee Increase - In 2003, the City undertook a Nexus Study to determine the appropriate amount for the Somerville Linkage Fee. In 2004, the Board of Aldermen voted to approve an increase of the Linkage Fee to \$3.91/sf for commercial development over 30,000sf. In 2012, the City undertook another Nexus Study to update and determine the appropriate amount for the Somerville Linkage Fee. The Nexus Study recommended an increase to \$5.15/sf. This proposal is currently before the Board of Aldermen for review and a vote. The Planning Board has already recommended approval of the increase.
- Generation of Housing Stock –
  - \$450,000 in HOME 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 was completed and occupied in PY12.
  - In addition, 79 units of affordable housing will be coming online via private development as a result of the inclusionary zoning ordinance.
- Other Housing Programs – Also since the 2008/2009 program year, 11 households in East Somerville have received Tenant-Based Rental Assistance and 3 households have received first time homebuyer assistance.

In addition to the affordable housing initiatives mentioned above, the City of Somerville also made significant progress on a number of transit and pedestrian improvement goals. The accomplishments listed below highlights the progress that has been made in creating and improving a suitable living environment in East Somerville.

- Rapid Transit Improvements in Assembly Square – Feasibility study has been completed and construction is underway on the Orange Line MBTA Station at Assembly Square. Projected opening date is June 2014.
- Green Line and Urban Ring Transit Improvements – Green line station at Washington Street has secured funding and construction is underway. Projected opening date is June 2014.
- Route 28 Corridor Improvements – The “Grounding McGrath” study was completed in 2013. Interim measure to improve safety and mobility and mobility for pedestrians and bicyclists will be completed in 2014.
- East Broadway Pedestrian and Bicycle Improvements – East Broadway Streetscape project is under construction including multi-modal improvements such as widened

sidewalks, new crosswalks, pedestrian lighting, and dedicated bicycle lanes. The Project is targeted for completion in 2014.

Union Square:

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. 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 table below outlines the progress made in program year 2012-2013 when compared to the original goals defined for the Union Square NRSA.

<b>Objective/Outcome</b>	<b>Source of Funds</b>	<b>Performance Indicator</b>	<b>5 Year Plan Goals</b>	<b>PY 2012 Accomplishment (NRSA Yr 5)</b>	<b>Project Progress</b>
<b>Improve the affordability of Decent Affordable Housing</b>					
Improve inclusionary housing requirement for residential development	N/A	Number of affordable units created	5-10 new affordable units in 5 years	10 units permitted. 1 unit under construction. No change in zoning requirements	Inclusionary zoning ordinance increased to 15% See additional progress below
Encourage generation of housing stock that is affordable by design and consistent with the neighborhood.	CDBG HOME	Number of affordable units created	10 new private, non-subsidized units in 5 years	Committed funds for 35 unit project on former Boys & girls site	Completed Linden St., St. Patrick's shelter, and made commitments for Washington St. See additional notes
<b>Objective/Outcome</b>	<b>Source of Funds</b>	<b>Performance Indicator</b>	<b>5 Year Plan Goals</b>	<b>PY 2012 Accomplishment (NRSA Yr 5)</b>	<b>Project Progress</b>
Sponsor renovation of existing housing that is affordable	CDBG LEAD	Number of new and rehabilitated units	25 new or rehabilitated units	3 units rehabilitated (2 rehab 1 heating system)	Rehabilitated 4 properties and lead abatement for 26 units. See additional

					comments below
<b>Improve the Sustainability of a Suitable Living Environment</b>					
Improve open and public spaces	CDBG	Number of parks renovated	2-4 parks renovated	1 park completed	3 parks completed
Prepare Union Square Open Space Plan and adopt zoning regulations to regulation to promote public open space	N/A	Studies completed and ordinances adopted	Complete Union Sq. Open Space Plan	No zoning changes in 2012	Completed USQ open space plan and adopted the usable open space requirement in 2009.
Increase the Tree Canopy	CDBG	Number of Trees Planted	Expand the tree canopy	54 trees planted	158 trees planted
<b>Increase the Availability/Accessibility of Economic Opportunities</b>					
Use Zoning to facilitate the development of additional arts related uses	CDBG	Number of Arts related initiatives	Designate an Arts Overlay district in USQ	None	Designated Arts Overlay District (2009) and installed benches, barrels, and kiosks designed by local artists
Strengthen public/private partnerships	CDBG	Number of Businesses Assisted	30 member businesses within 5 years	2 businesses assisted	25 businesses assisted
Stimulate commercial property improvements and business expansion	CDBG	Number of storefronts improved	5 storefronts renovated	None	10 storefronts Improved
Support Union Square small businesses through business development educational services for low and moderate income businesses	CDBG	Number of Business Assisted	20 businesses in 5 years	None	21 businesses assisted
Prepare a rezoning plan for Union Square	N/A	Zoning code changes implemented	Adoption of new zoning plan	Union Square Revitalization Plan adopted by Board of	Union Square Revitalization Plan adopted

				Alderman in August 2012	by Board of Alderman in August 2012
Use zoning regulations to promote desired uses and design in Boynton Yards.	CDBG	Commercial and Industrial Improvement activities	Complete transportation & utility study	Entered final phase of study	Initiated engineering and design phase for transportation and utility improvements in Boynton Yards.

Union Square Additional Progress

The city of Somerville has made significant progress on a number of the goals that were established for the Union Square NRSA. Specifically, the city has made a number of achievements related to housing that will have a long term impact on the availability of affordable housing in the area

- Promoting Homeownership - SCC, the City's CHDO, conducts regular First-time Homebuyer Education classes out of their office in Union Square. In 2013, they held 8 sessions. They have also established a Financial Education class and offered the course 3 times in 2013. Housing Division staff attends all courses to educate participants about the opportunities available to them, from affordable homeownership units available for purchase to rehab and lead abatement programs, to referral resources.
- Develop new and rehabilitated affordable housing opportunities –
  - \$1,870,000 in City Funds were expended for the acquisition and development of 42 units of affordable rental housing at 24 Linden Street in 2001. This included \$276,726 in CDBG, \$1,383,274 in HOME and \$210,000 in Somerville Affordable Housing Trust Funds. While not completed in the past five years, this project was specifically identified in the original NRSA plan.
  - In 2008 \$9,050 in CDBG funds were expended on the Catholic Charities St. Patrick Shelter, including installation of a lift to make the facility handicapped accessible. The shelter houses 41 homeless women every night
  - In 2013, the City of Somerville committed \$600,000 in HOME funds and \$200,000 in Somerville Affordable Housing Trust Funds for the development of a 35-unit affordable rental project at 181 Washington Street, the former Boys and Girls Club building
  - Since program year 2008/2009, 5 households in Union Square have received Tenant based rental assistance
- Inclusionary Zoning Ordinance - New zoning passed in 2009 for Union Square changed much of the area from to CCD55, TOD55 and TOD70 and TOD135. While the Inclusionary Housing Ordinance requires 12.5% of units be made affordable in most zoning districts, TOD55 and TOD70 have an inclusionary housing requirement of 15% and TOD135 has an inclusionary housing requirement of 17.5%. Since its inception, the

Somerville Inclusionary Housing Ordinance has created 4 units of affordable housing in Union Square. However, due to the downturn in the housing market during those years, this was a result of the slow housing development market. Current approved housing developments in Union Square will bring 74 privately-built housing units, 10 of them affordable. An additional 184 immediately abutting the NRSA along Prospect Street and Washington are also in the pipeline, and will include 23 affordable units.

- Linkage Fee Increase - In 2003, the City undertook a Nexus Study to determine the appropriate amount for the Somerville Linkage Fee. In 2004, the Board of Aldermen voted to approve an increase of the Linkage Fee to \$3.91/sf for commercial development over 30,000sf. In 2012, the City undertook another Nexus Study to update and determine the appropriate amount for the Somerville Linkage Fee. The Nexus Study recommended an increase to \$5.15/sf. This proposal is currently before the Board of Aldermen for review and a vote. The Planning Board has already recommended approval of the increase.

In addition to the accomplishments above, the City of Somerville continues to move forward with planning efforts for the revitalization of Union Square. In support of this goal, significant progress has been made in the area of transportation and infrastructure improvements including:

- The MBTA has reached 60% design stage for five Green Line stations in Somerville with significant public input and collaboration from City Staff.
- Completed the Union Square Transportation and Infrastructure Study Functional Design Report 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.,
- Secured development agreements with two property owners in Boynton Yards for future Transit Oriented Development projects,
- Initiated a Municipal Space Needs Analysis and Master Facilities Plan which identifies surplus land for redevelopment,
- Continued construction of roadway improvements leading into Union Square on Somerville Avenue.

#### Community Challenge Grant

In 2011, the City of Somerville became the only municipality in Massachusetts to receive a Community Challenge Planning Grant from HUD. 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 2012-2013 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>FY2012 Accomplishments</u>	<u>Project Progress</u>
<b><i>Increase Availability/Accessibility of Decent Affordable Housing</i></b>					
Improve the availability by creating new affordable housing units	HOME	Number of permanent affordable housing units created	100	29 units completed, 60 under construction	SPV2 completed, SPV3 under construction for completion Winter 2014, Massachusetts Bay Veterans Center under construction for Fall 2013
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 19 programs totaling \$2,334,299	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 rented and 6 affordable homeownership units sold, 56 affordable rental units began marketing and 8 affordable homeownership units under construction	Completed.
<b><i>Improve the Affordability of Decent Affordable Housing</i></b>					
Increase affordability of rental housing	HOME	Number of households with rental assistance	Assist 30 tenants per year	32 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	4 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 across all programs	26 units rehabilitated, 44 units abated for lead.	Completed.
--	----------------------	--	--	---	------------

**Create Suitable Living Environment**

<b>Objective/Outcome Specific Obj #</b>	<b>Source of Funds</b>	<b>Performance Indicators</b>	<b>5 Year Plan Goals</b>	<b>FY2012 Accomplishments</b>	<b>Project Progress</b>
<b><i>Increase the Availability/Accessibility of Suitable Living Environment</i></b>					
Provide opportunities to improve residents social, economic, and political situation	CDBG	Number of residents served	Serve 2,160 residents over 5 years	671 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	278 households served	Completed for program year.
Provide education and leadership opportunities for youth	CDBG	Number of youth served	Serve 780 youth over 5 years	795 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	578 residents served	Completed for program year.
Prevent homelessness	ESG	Numbers of residents assisted	Provide case management to 1,000 residents over 5 years	668 residents served	Completed for program year.
Provide support services for elderly and disabled	CDBG	Number of residents served	Serve 2,100	500 elderly and disabled residents served	Completed for program year.
<b><i>Improve the Sustainability of a Suitable Living Environment</i></b>					
Renovate existing parks	CDBG	Number of Parks Renovated	Renovate 6 parks within 5 years	2 parks completed, 2 improved, and 1 underway	Completed for program year.
Increase tree canopy	CDBG	Number of Trees Planted	Plant 100 trees annually	174 trees planted	Completed.

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**

<b><u>Objective/Outcome Specific Obj #</u></b>	<b>Source of Funds</b>	<b>Performance Indicators</b>	<b>5 Year Plan Goals</b>	<b>FY2012 Accomplishments</b>	<b>Project Progress</b>
<b><i>Increase the Availability/Accessibility of Economic Opportunities</i></b>					
Support new businesses with technical assistance	CDBG	Number of businesses receiving assistance	30 businesses	2	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.

**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 2012.

**Program Year 2012 Leveraged Funds Expended**

Activity	CDBG	HOME	ESG	City General Fund	Other Non-Federal Match	Other State & Federal	Total
Planning & Admin	\$456,743	\$115,901		\$135,772			\$708,416
Economic Development	\$253,281			\$28,864	\$40,000 <sup>1</sup>	\$158,150 <sup>2</sup>	\$480,294
Transportation & Infrastructure	\$73,779			\$89,123	\$631,900 <sup>3</sup>	\$203,761 <sup>4</sup>	\$998,563
Parks & Open Space	\$686,350				\$626,250 <sup>5</sup>	\$900,000 <sup>6</sup>	\$2,212,600
Affordable Housing	\$532,943	\$928,438		\$64,441	\$4,747,584	\$8,824,740 <sup>7</sup>	\$15,098,146
Public Services	\$335,650				\$206,000 <sup>8</sup>	\$467,800	\$1,009,450
Emergency Solutions			\$194,735		\$16,700 <sup>8</sup>	\$1,007,800 <sup>8</sup>	\$1,219,235
Project Costs	\$436,180						\$436,180
	\$2,774,926	\$1,044,339	\$194,735	\$318,201	\$6,268,434	\$11,562,250	\$22,162,885

<sup>1</sup>Sub-Recipient matching funds.

<sup>2</sup>EPA Hazard, MA DEP, and MA DOT Funds.

<sup>3</sup>State Grant and MA DOT

<sup>4</sup>HUD Community Challenge Grant

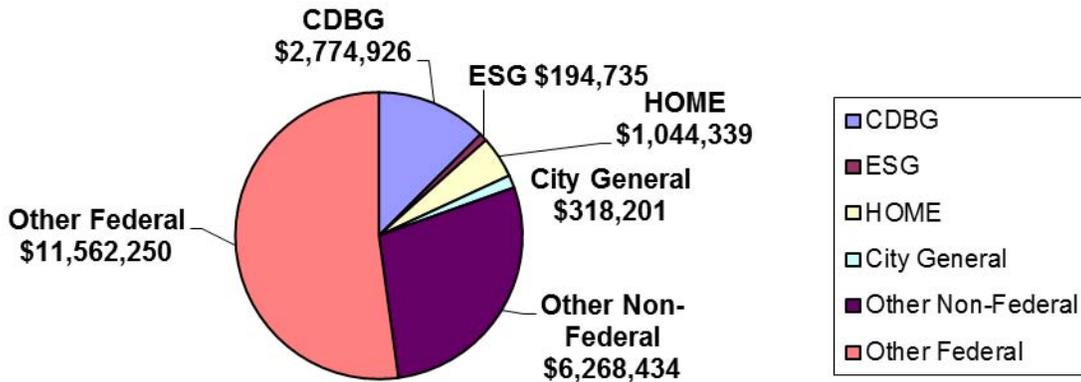
<sup>5</sup>City Bond

<sup>6</sup>PARC Grant

<sup>7</sup>HUD Healthy Homes and LEAD Grants

<sup>8</sup>Private sources

**2012-2013 Leverage Funds Expended**



**2012-2013 Public Service Agency Match Contributions:**

<b>Agency</b>	<b>Award PY12</b>	<b>Match Amount</b>	<b>Match Source</b>
Boys & Girls Clubs	\$8,700	\$74,000	United Way
Cambridge Pub Health	\$3,000	\$61,000	MA Dept of Public Health for Family Planning and Somerville School Dept
CASPAR Inc	\$5,000	\$20,300	Cambridge CDBG
Ctr Teen Empowerment	\$72,000	\$47,000	Shannon Funding, United Way, Barr Foundation, ticket sales/fees
Riverside/Guidance Center	\$4,500	\$18,000	Cambridge CDBG, Cambridge Foundation
Groundwork Somerville	\$4,500	\$25,000	Foundations (Lewellyn)
Haitian Coalition	\$8,498	\$0	
Just-a-Start Corp	\$4,250	\$10,000	Corporate, foundation and private sources
MAPS Port. Speakers	\$5,000	\$18,000	Cambridge CDBG
Mystic Learning Center	\$15,500	\$68,000	Somerville Housing Authority, Metro North Regional Employment Board, Department of Early Education and Care
Respond Inc	\$17,467	\$16,500	Dept. of Children and Families, event contributions
SCM Com. Transport.	\$60,500	\$0	Medford and Cambridge CDBG
Somerville Comm. Corp	\$8,498	\$70,000	Dept of Justice, Somerville School Department
Somerville Homeless BetHom	\$6,637	\$70,000	HUD
Somerville Homeless SOUP	\$60,362	\$29,000	Emergency Food Shelter Program (EFSP), Project Bread & Donations
Som. Homeless Inf/Ref	\$8,074	\$20,000	Donations
Som. YMCA	\$6,147	\$12,000	Partners w/Youth
Som. YMCA CIT/LIT	\$21,245	\$0	
Transition House	\$4,750	\$18,000	Kent St Housing Partnership
Welcome Project	\$7,800	\$19,000	Foundations (Johnson Family, Agnes Linsey Trust, Tufts PERIS), Somerville Housing Auth.
Som. Arts Council	\$8,328	\$18,000	Somerville Housing Auth, private foundation, fees
Som. Cares About Prevention	\$8,498	\$40,000	MA Dept of Public Health Bureau of Sub Abuse
Som. Council on Aging	\$16,136	\$20,000	Title IIIB, City Appropriations
	<b>\$365,390</b>	<b>\$673,800</b>	

**ESG Agency Match Contributions:**

ESG Grant 2012	Awarded	Eligible Activity	Match
CASPAR Inc 5 Middlesex Ave	\$21,000	Street Outreach	22K MIT in-kind, 4.6K annual appeal
Catholic Charities 270 Washington St	\$11,500	Street Outreach	13K OHCD (formerly DTA), 6.5K Cambridge Com Foundation, 2K Citizen's Energy;
CAAS 66-70 Union Sq.	\$10,000 \$5,000	Homeless Prevention Rapid Re-Housing	179K Community Service Block Grant
Respond Inc P O Box 555	\$25,500 \$5,000	Shelter Operations Rapid Re-Housing	150K Dept of Children & Families
Somerville Homeless Coalition 1 Davis Square	\$58,000 \$38,025 \$23,836 \$6,300	Shelter Operations Homelessness Prvnt Rapid Re-Housing HMIS	465.5K DTA, 23.5K donations/events, 19.8K Emergency Food & Shelter Program, 12.6K events, 62.7K United Way, 14K AHTF (PASS)
Transition House 32 Kent Street	\$3,000	Homelessness Prevention	18.6K Kent St Housing Project, 14K US Dept Housing
Administration 93 Highland Ave	\$16,751	Administration	16.7K CDBG
	\$223,912		\$1,024,500

**Housing Division Matching Contributions:**

Private Funds for Housing Rehabilitation	\$24,835	Homeowners' own funds
Private Funds for Down Payment/Closing Cost	\$178,571	Homebuyers' own funds
Private Mortgages for First Time Homebuyers	\$599,017	Public & Private Lending Institutions
Private Mortgages for Housing Developers	\$11,000,000	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 \$1,114,785 of HOME and HOME PI funds during the program year. Excluding \$115,901 of AD and CO funds and \$70,447 of PI funds drawn, the amount requiring the 25% match was \$928,438 for a match liability of \$232,110.

The City was able to report \$1,257,161 of match this period which it received in the form of two non-federal funds grants contributed to the Cross Street Apartments CHDO Housing Project, and the appraised value of real estate contributed in perpetuity to four (4) properties sold to low-income households through the City's Inclusionary Housing program.

**Parks & Open Space Matching Contributions**

15-25 Cross Street / Harris Park	\$811,250
North Street Playground	\$715,000
<b>Total Parks &amp; Open Space</b>	<b>\$1,526,250</b>

**Transportation & Infrastructure**

East Broadway Streetscape	\$6,530,964
Community Path	\$2,100,000
<b>Total Parks &amp; Open Space</b>	<b>\$8,630,964</b>

**Economic Development Matching Funds**

Arts Union	\$20,000
East Somerville Main Streets	\$20,000
<b>Total Economic Development</b>	<b>\$40,000</b>

## **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 2012-2013 HUD year the City of Somerville held 4 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 2012-2013 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, September 5, 2013 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.

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

## ESG Supplement to the CAPER in *e-snaps*

### For Paperwork Reduction Act

#### 1. Recipient Information—All Recipients Complete

##### Basic Grant Information

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

##### ESG Contact Name

Prefix	0
First Name	Jayne
Middle Name	0
Last Name	Gulla
Suffix	0
Title	Director of Administration and Finance

##### ESG Contact Address

Street Address 1	0
Street Address 2	0
City	0
State	
ZIP Code	-
Phone Number	0
Extension	0
Fax Number	0
Email Address	jgulla@somervillema.gov

##### ESG Secondary Contact

Prefix	0
First Name	PAUL
Last Name	CONNOLLY
Suffix	0
Title	0
Phone Number	6179948592
Extension	0

CAPER

1

Email Address

PAUL.M.CONNOLLY@HUD.GOV

## 2. Reporting Period—All Recipients Complete

Program Year Start Date 07/01/2012

Program Year End Date 06/30/2013

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

**Subrecipient or Contractor Name:** CASPAR, Inc

**City:** Cambridge

**State:** MA

**Zip Code:** 02143,

**DUNS Number:** 075367789

**Is subrecipient a VAWA-DV provider:** N

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

**ESG Subgrant or Contract Award Amount:** 21000

**Subrecipient or Contractor Name:** Catholic Charities

**City:** Somerville

**State:** MA

**Zip Code:** 02143,

**DUNS Number:** 092189950

**Is subrecipient a VAWA-DV provider:** N

**Subrecipient Organization Type:** Faith-Based Organization

**ESG Subgrant or Contract Award Amount:** 11500

**Subrecipient or Contractor Name:** Respond, Inc.

**City:** Somerville

**State:** MA

**Zip Code:** 02143,

**DUNS Number:**

**Is subrecipient a VAWA-DV provider:** Y

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

**ESG Subgrant or Contract Award Amount:** 30500

**Subrecipient or Contractor Name:** Somerville Homeless Coalition, Inc.

**City:** Somerville

**State:** MA

**Zip Code:** 02144,

**DUNS Number:** 847408804

**Is subrecipient a VAWA-DV provider:** N

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

**ESG Subgrant or Contract Award Amount:** 126161

**Subrecipient or Contractor Name:** Transition House

**City:** Somerville

**State:** MA

**Zip Code:** 02143,

**DUNS Number:**

**Is subrecipient a VAWA-DV provider:** Y

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

**ESG Subgrant or Contract Award Amount:** 3000

**Subrecipient or Contractor Name:** City of Somerville - SPCD

**City:** Somerville

**State:** MA

**Zip Code:** ,

**DUNS Number:** 061054693

**Is subrecipient a VAWA-DV provider:** N

**Subrecipient Organization Type:** Unit of Government

**ESG Subgrant or Contract Award Amount:** 16750

**Subrecipient or Contractor Name:** Community Action Agency of Somerville (CAAS)

**City:** Somerville

**State:** MA

**Zip Code:** ,

**DUNS Number:**

**Is subrecipient a VAWA-DV provider:** N

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

**ESG Subgrant or Contract Award Amount:** 15000

## CR-65 - Persons Assisted

### 4. Persons Served

#### 4a. Complete for Homelessness Prevention Activities

Number of Persons in Households	Total
Adults	116
Children	20
Don't Know/Refused	0
Missing Information	0
<b>Total</b>	<b>136</b>

Table 1 – Household Information for Homeless Prevention Activities

#### 4b. Complete for Rapid Re-Housing Activities

Number of Persons in Households	Total
Adults	45
Children	20
Don't Know/Refused	0
Missing Information	0
<b>Total</b>	<b>65</b>

Table 2 – Household Information for Rapid Re-Housing Activities

#### 4c. Complete for Shelter

Number of Persons in Households	Total
Adults	454
Children	64
Don't Know/Refused	1
Missing Information	14
<b>Total</b>	<b>533</b>

Table 3 – Shelter Information

#### 4d. Totals for all Persons Served with ESG

Number of Persons in Households	Total
Adults	535

CAPER

Children	118
Don't Know/Refused	1
Missing Information	14
<b>Total</b>	<b>668</b>

**Table 4 – Household Information for Persons Served with ESG**

### 5. Gender—Complete for All Activities

	<b>Total</b>
Male	252
Female	402
Transgendered	0
Unknown	14
<b>Total</b>	<b>668</b>

**Table 5 – Gender Information**

### 6. Age—Complete for All Activities

	<b>Total</b>
Under 18	118
18-24	62
Over 24	432
Don't Know/Refused	42
Missing Information	14
<b>Total</b>	<b>668</b>

**Table 6 – Age Information**

### 7. Special Populations Served—Complete for All Activities

#### Number of Persons in Households

Subpopulation	Total Persons Served – Prevention	Total Persons Served – RRH	Total Persons Served in Emergency Shelters	Total
Veterans	5	0	0	5
Victims of Domestic Violence	135	0	66	69
Elderly	33	0	5	28
HIV/AIDS	11	11	0	11
Chronically Homeless	209	0	19	190

<b>Persons with Disabilities:</b>				
Severely Mentally Ill	177	0	31	156
Chronic Substance Abuse	199	0	4	110
Other Disability	118	0	33	91
Total (Unduplicated if possible)	494	116	45	357

**Table 7 – Special Population Served**

## CR-70 – Assistance Provided

### 8. Shelter Utilization

Number of New Units - Rehabbed	0
Number of New Units - Conversion	0
Total Number of bed-nights available	0
Total Number of bed-nights provided	0
Capacity Utilization	0.00%

**Table 8 – Shelter Capacity**

## CR-75 – Expenditures

### 11. Expenditures

#### 11a. ESG Expenditures for Homelessness Prevention

	Dollar Amount of Expenditures in Program Year		
	FY 2009	FY 2010	FY 2011
Expenditures for Rental Assistance	0	0	0
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	0	17,363
Expenditures for Housing Relocation & Stabilization Services - Services	0	0	22,710
Expenditures for Homeless Prevention under Emergency Shelter Grants Program	0	0	3,000
<b>Subtotal Homelessness Prevention</b>	<b>0</b>	<b>0</b>	<b>43,073</b>

Table 9 – ESG Expenditures for Homelessness Prevention

#### 11b. ESG Expenditures for Rapid Re-Housing

	Dollar Amount of Expenditures in Program Year		
	FY 2009	FY 2010	FY 2011
Expenditures for Rental Assistance	0	0	0
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	0	10,101
Expenditures for Housing Relocation & Stabilization Services - Services	0	0	9,140
Expenditures for Homeless Prevention under Emergency Shelter Grants Program	0	0	0
<b>Subtotal Rapid Re-Housing</b>	<b>0</b>	<b>0</b>	<b>19,241</b>

Table 10 – ESG Expenditures for Rapid Re-Housing

#### 11c. ESG Expenditures for Emergency Shelter

	Dollar Amount of Expenditures in Program Year		
	FY 2009	FY 2010	FY 2011
Essential Services	0	0	0
Operations	0	0	83,500
Renovation	0	0	0
Major Rehab	0	0	0
Conversion	0	0	0

<b>Subtotal</b>	<b>0</b>	<b>0</b>	<b>83,500</b>
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**Table 11 – ESG Expenditures for Emergency Shelter**

**11d. Other Grant Expenditures**

	<b>Dollar Amount of Expenditures in Program Year</b>		
	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>
HMIS	0	0	5,040
Administration	0	0	16,537
Street Outreach	0	0	27,344

**Table 12 - Other Grant Expenditures**

**11e. Total ESG Grant Funds**

<b>Total ESG Funds Expended</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>
194,735	0	0	194,735

**Table 13 - Total ESG Funds Expended**

**11f. Match Source**

	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>
Other Non-ESG HUD Funds	0	0	30,700
Other Federal Funds	0	0	821,500
State Government	0	0	19,800
Local Government	0	0	0
Private Funds	0	0	30,500
Other	0	0	122,000
Fees	0	0	0
Program Income	0	0	0
<b>Total Match Amount</b>	<b>0</b>	<b>0</b>	<b>1,024,500</b>

**Table 14 - Other Funds Expended on Eligible ESG Activities**

**11g. Total**

<b>Total Amount of Funds Expended on ESG Activities</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>
1,219,235	0	0	1,219,235

**Table 15 - Total Amount of Funds Expended on ESG Activities**



**PART I: SUMMARY OF CDBG RESOURCES**

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	7,041,649.72
02 ENTITLEMENT GRANT	2,435,932.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	67,530.00
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 RETURNS	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	298,389.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	9,843,500.72

**PART II: SUMMARY OF CDBG EXPENDITURES**

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	2,318,183.06
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	2,318,183.06
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	424,835.86
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	46,021.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	2,789,039.92
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	7,054,460.80

**PART III: LOWMOD BENEFIT THIS REPORTING PERIOD**

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	349,654.49
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	130,796.75
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	1,136,780.53
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	92,099.01
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	1,709,330.78
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	73.74%

**LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS**

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: 2010 PY: 2011 PY: 2012
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	2,789,039.92
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	2,364,204.06
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	84.77%

**PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS**

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	335,649.89
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	17,881.97
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	18,957.85
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	334,574.01
32 ENTITLEMENT GRANT	2,435,932.00
33 PRIOR YEAR PROGRAM INCOME	250,378.55
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	2,686,310.55
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	12.45%

**PART V: PLANNING AND ADMINISTRATION (PA) CAP**

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	424,835.86
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	46,021.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	14,139.26
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	25.54
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	456,743.14
42 ENTITLEMENT GRANT	2,435,932.00
43 CURRENT YEAR PROGRAM INCOME	67,530.00
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	2,503,462.00
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	18.24%



# PUBLIC HEARING

Mayor Joseph A. Curtatone and the Office of Strategic Planning and Community Development invite you to a public hearing to review the City's 2012-2013 Consolidated Annual Performance and Evaluation Report (CAPER), and to obtain public input on its performance on the current grants funded by the US Department of Housing and Urban Development (HUD).

**6:00 PM Thursday, September 5, 2013**

*Ralph and Jenny Center*

*9 New Washington St, Somerville, MA*

For more information contact the Office of Strategic Planning and Community Development at (617) 625-6600 ext. 2500. Accommodations for persons with disabilities are available by contacting Betsy Allen at (617) 625-6600 ext. 2323. Accommodations for non-English speaking or hearing impaired persons are available by contacting (OSPCD) at (617) 625-6600 ext.2500.

Written comments will be accepted up to Monday, Oct 7, 2013 @ 4:30 p.m., to the attention of Alan Inacio at the Office of Strategic Planning and Community Development (OSPCD), 93 Highland Avenue, Somerville, MA 02143 or email to [ainacio@somervillema.gov](mailto:ainacio@somervillema.gov)



*Quincy Park*



*St. Polycarp*



*Harris Park*



# AUDIENCIA PÚBLICA

El Alcalde Joseph A Curtatone y la Oficina de Planificación Estratégica y Desarrollo Comunitario les invitan a una audiencia pública para revisar el Informe Consolidado 2012-2013 sobre el Desempeño Anual y Evaluación de la Ciudad (CAPER), y para recibir la opinión de la comunidad sobre su desempeño en las actuales subvenciones otorgadas por el Departamento de Vivienda y Desarrollo Urbano (HUD).

**Jueves, 5 de Septiembre 2013 a las 6:00 PM**

*Ralph and Jenny Center*

*9 New Washington St, Somerville, MA*

Para obtener más información comuníquese con la Oficina de Planificación Estratégica y el Desarrollo Comunitario en (617) 625-6600 ext. 2500. Adaptaciones para personas con discapacidad están disponibles contactando a Betsy Allen a (617) 625-6600 ext. 2323. Adaptaciones para personas que no hablan inglés o con deficiencia auditiva están disponibles contactando a (OSPCD) a (617) 625-6600 ext. 2500.

Comentarios escritos serán aceptados hasta lunes, 7 de Octubre de 2013 a las 4:30 pm., a la atención de Alan Inacio en la Oficina de Planificación Estratégica y el Desarrollo Comunitario (OSPCD), 93 Highland Avenue, Somerville, MA 02143 o por correo electrónico a [ainacio@somervillema.gov](mailto:ainacio@somervillema.gov)



*Parque Quincy*



*St. Polycarp*



*Parque Harris*



# AUDÊNCIA PÚBLICA

O Prefeito Joseph A. Curtatone e o Escritório de Planejamento Estratégico e Desenvolvimento Comunitário convidam você para uma audiência pública para rever o Relatório Consolidado de 2012-2013 no Desempenho Anual e Avaliação da Cidade (CAPER) e para receber a opinião da Comunidade sobre seu desempenho nos atuais subsídios fornecidos pelo Departamento de Habitação e Desenvolvimento Urbano (HUD).

**Quinta-feira, 5 de setembro de 2013 às 18:00**

*Ralph and Jenny Center*

*9 New Washington St, Somerville, MA*

Para mais informações, entre em contato com o Escritório de Planejamento Estratégico e Desenvolvimento Comunitário (617) 625-6600 ext. 2500. Acomodações para pessoas com deficiência estão disponíveis contactando a Betsy Allen no (617) 625-6600 ext. 2323. Acomodações para pessoas que não falam inglês ou deficientes auditivos estão disponíveis contactando (OSPCD) no (617) 625-6600 ext. 2500.

Comentários escritos serão aceitos até segunda-feira, 7 de outubro de 2013, às 16:30, e devem ser dirigidos a Alan Inacio no Escritório de Planejamento Estratégico e Desenvolvimento Comunitário (OSPCD), 93 Highland Avenue, Somerville, MA 02143 ou por email [ainacio@somervillema.gov](mailto:ainacio@somervillema.gov)



*Parque Quincy*



*St. Polycarp*



*Parque Harris*

Consolidated Annual Performance Evaluation Report  
Public Hearing  
September 5<sup>th</sup>, 2013

**Jayne Gulla** - Good evening and welcome to tonight's public hearing held by the City of Somerville's Office of Strategic Planning and Community Development. Tonight we are presenting the Consolidated Annual Performance Evaluation Report (CAPER) for the program year July 1, 2012 – June 30<sup>th</sup> 2013. My name is Jayne Gulla, director of finance and administration. Here with me tonight are Alan Inacio, he is our Senior Accountant, Kesh Gedeon, who is our newly hired Program Compliance Officer, Hayes Morrison, Our Director of Transportation and Infrastructure. She will be speaking tonight about the various parks we have completed, Dana LeWinter, She is our Housing Director, Penny Snyder, Public Service and Emergency Solutions Grants administrator, David Guzman, Economic Development planner. At this point I would like to introduce Alan Inacio who will provide an overview of the Consolidated Plan, One Year Action Plan, and the Caper.

**Alan Inacio** – Thank you Jayne. Good evening everyone. What is a Consolidated plan? Under the code of federal regulations 24 CFR 91, a consolidate plan is required in order to qualify for CDBG, HOME, and ESG funding. A consolidate plan serves the following functions.

- One, it is a planning document that builds on a participatory process at the lowest levels.
- Two, it is an application for federal funds under HUD's formula grant programs.
- Three, it is a strategy to be followed in carrying out HUD programs.
- Lastly, the action plan provides the basis for assessing performance.

The goal of a consolidated action plan and these HUD funds is to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities principally for low and moderate income persons.

Overview of the 1 Year Action Plan- The 1 Year Action plans are the plans and budgets for HUD CDBG, HOME and ESG funds for each year guided by the needs and priorities set forth in the 5 Year Consolidated Plan.

- CDBG funds can be used in a flexible manner for economic development, improvements to parks and open space, needed public services and affordable housing projects and programs.
- HOME Investment Partnership Funds can be used to further affordable housing programs and projects.
- Emergency Solutions Grant (ESG) Funds are to be used to support shelters, prevention, and rapid re-housing programs for homeless and those at risk of homelessness.

Overview of the CAPER. The Consolidated Annual Performance and Evaluation report (CAPER) provides annual performance reporting. The CAPER, in conjunction with the Integrated Disbursement Information System (IDIS), fulfills statutory and regulatory program reporting requirements and provides the City of Somerville and HUD with the necessary information to assess the overall program performance and accomplishments against planned

goals and objectives. Before I move on does anyone have any questions on either the Caper or the Consolidate Action Plan? Thank you.

**Jayne Gulla.** Thank you Alan. Here we have a bar chart which shows the City of Somerville fiscal year comparison of HUD CDBG expenditures. We dated it from the program year starting in 2007-2008 through the current year which is program year 2012. As you can see at one time our entitlement was as high as \$4.4 million dollars. However the last couple of years the entitlement has been in decline as seen by last years entitlement which was \$2,774,926. The next slide here shows the City of Somerville's low to moderate income population. As you can see towards the Cambridge and Boston area sides shaded in red is where the majority of the city's low to moderate income population is located and is our primary focus. These are where our East Somerville and Union Square NRSA's exist. The next slide is the same City of Somerville slide which highlights with icons the new and expanded site specific activities related to housing, economic development, community development, and the green trees denotes parks and open space and again as I mentioned in the previous slide here you can actually see the Union Square and East Somerville NRSA's outlined here. Union Square in red and East Somerville in Blue. This is a pie chart of the city's 2012 CDBG expenditure. This is all broken out here in this colored pie chart and this is the full \$2,774,926 we discussed earlier. As you can see we spent just over half a million on affordable housing, quite a bit on Public Service grants, \$335 thousand, Economic Development \$253 thousand and Transportation and Infrastructure as you can see here and further down we have Parks and Public Improvements. We also have administrative costs and project costs involved in delivering the goals and improvements of the past program year. Does anyone have any questions on this slide? O.K. Thank you. Now I will turn things over to our Economic Development team.

**David Guzman.** Thank you Jayne. As Jayne mentioned the slide here shows the main initiatives which we focused our economic development activities. The Main Streets concept was one of the main programs utilized . These are basically a technical assistance program which work with the small businesses in the area to promote activity and vitality within there areas. Along with the Union Square Main Streets support was also provided to the Union Square farmers market. The farmers market showcases local grown produce and works closely with union square main streets to provide oversight, marketing services and supplementary activities to the farmers market. The farmers market also stresses healthy foods and promotes healthy lifestyles. Again this has been a very popular activity over the past several years. On the next slide is another activity I'd like to highlight which is the East Somerville Main Streets. Again, this organization is fashioned under the overview of the Main Streets organizations and has made steady progress in helping to provide commercial and economic development through working collaboratively in the East Somerville area. Our Storefront improvements program has assisted several local businesses in the area by providing technical and financial assistance to property owners and tenants in eligible area in the City to renovate or upgrade their commercial building facades. The improvements are important not only for the owners but for the general area as it attracts shoppers and other retailers to the area. The last slide I would like to point out is an outline slide which shows the distribution of all the CDBG funds spent on Economic Development activities. If there are any questions I can take them now or at the end of this presentation. Thank you Jayne

**Jayne Gulla:** Thank you David. Now I'd like to introduce Hayes Morrison, Director of Transportation and Infrastructure. She will be discussing the transportation and infrastructure improvements as well as Parks and Open Space Improvements.

**Hayes Morrison:** Thank you Jayne. There were two projects that used CDBG funds for this program year. The first was the Community Path Design and Construction. This project involves the first extension of the community path in over twenty years extending the path one quarter of a mile beyond the current end point at Cedar street. The second project was for the East Broadway Streetscape project which falls within our East Somerville NRSA region. Construction has commenced on this project and it is scheduled for completion in 2014.

**Hayes Morrison:** Now with respect to Parks and Open Space there were a number of projects which utilized CDBG funding. First, the street tree planting program which is part of the city wide goal to increase the City's urban tree canopy , including planting trees in block grant eligible areas. A number of parks were also completed most notably Chuckie Harris park which was just recently in June, Quincy park which held its grand opening in January of this year, and North Street park which has completed its initial design and architecture phase and construction is currently underway.

**Jayne Gulla:** Thank you Hayes. Next Dana Lewinter, our Housing Director will speak about our Housing programs.

**Dana Lewinter:** Thank you Jayne. Good evening everyone. Tonight I'll be speaking about some of eligible programs where we expended HOME and CDBG funds. Some of the eligible uses of funds go towards new construction of housing, housing rehabilitation, Tenant-Based Rental Assistance, and Home Buyers Assistance. In Program Year 2012 \$912,897 of HOME funds \$197,895 of CDBG funds were expended or committed for either housing development or housing rehabilitation projects. The following table highlights the major accomplishments we achieved for the various sources of funds expended. In the housing development area we continue to work on

- St. PolyCarps Village phases 2 & 3
- 75 Cross St.
- Massachusetts Bay Veterans Center

In housing rehabilitation some of the major accomplishments include:

- 8 new loans started and 16 loans completed
- 26 units completed and
- 20 low-mod families assisted

For the tenant base rental assistance, home buyer assistance, heating system replacement, and lead hazard abatement programs the following accomplishments were achieved

- 32 low income households assisted
- 4 households received closing cost assistance
- 3 home received heating system replacement assistance
- 44 units were abated for lead

In addition to the federal funds received Somerville also leverages other housing programs including the Somerville Affordable housing trust fund which funded \$390,992 in housing

program grants, homebuyer assistance, tenant stabilization, and new construction projects Massachusetts Bay Veterans Center. and St. Polycarps.

The Inclusionary Housing program also sold 6 affordable condominiums to income eligible purchasers, rented 27 units to income eligible tenants, and are marketing and additional 56 affordable rental units and 8 affordable condominiums.

Finally, we Support the Somerville-Arlington Continuum of Care which benefit from funds provided by the HUD McKinney Continuum of Care. Somerville provides funding for a consultant to organize the application process for these funds. So as you can see on the next two slides there are several organizations that benefit from these funds. Are there any questions on any of these programs? Thank you.

**Jayne Gulla:** Thank you Dana. Next I will bring up Penny Snyder who is our administrator for our Public Services as well as our Emergency Solutions Grant.

**Penny Snyder** – The next few slides demonstrate how CDBG Public Service and Emergency Shelter Funds were expended during this reporting period.

CDBG Public Service and Emergency Shelter Funds were awarded to non-profit agencies providing services to low income residents. In an RFP process, agencies indicated how their program would address goals outlined in the 5 Year Plan. There are 6 primary goals

1. To create economic opportunities for residents  
CDBG funds were awarded to agencies providing
  - Job readiness programs designed for adults and youth
  - As well as, English as a Second courses and citizenship classes to enable residents to seek better jobs
    - 670 residents participated in ESOL classes
2. To create opportunities for children to live healthy/productive lives  
CDBG funds were awarded to agencies providing
  - Day care programming – such as - early intervention services, parenting workshops, nutrition program for youth, as well as, after-school enrichment programs
    - 270 children/youth received academic support.
3. To create education and leadership opportunities for youth  
CDBG funds were awarded to agencies working with youth around
  - Mentoring and leadership training skills,
  - Tutoring
  - Substance abuse and gang prevention strategies
  - Employment skills
  - 790 youth participated in various leadership programs
4. To create programs for low income resident who have difficulty meeting their needs  
CDBG funds were awarded to social service agencies
  - Providing outreach and education to familiarize residents with the availability of services in the City and how to access those services
  - 578 residents assisted through case management

5. To prevent homelessness and provide support services  
CDBG and ESG funds were provided to agencies
  - Offering 24 hour hot-line referral and support services, 950 people were assisted with these programs.
  - As well as, emergency and transition shelter programs
6. To provide services for the elderly and disabled  
CDBG funds provided elderly and disabled residents with
  - Transportation services to doctor's appointments and grocery shopping to remain independent
  - As well as, educational and recreational programming at Senior Centers
  - Overall we provided 550 elderly residents on fixed incomes with services.

The final two slides detail the amount of funds provided to our various sub-grantee organizations over the past program year. At this time I would like to ask if anyone has any questions? Thank you.

**Alan Inacio** – Thank you Penny. We want to make sure you are aware the CAPER is available on the City's website [www.somervillema.gov](http://www.somervillema.gov). In addition to tonight's meeting you will have an opportunity to provide us with written comments. The comment period will be open through October 7<sup>th</sup>. We invite your comments through email to myself at [ainacio@somervillema.gov](mailto:ainacio@somervillema.gov) or you can write to us at OSPCD: Attn: Alan Inacio 93 Highland Ave, Somerville Ma 02143 or lastly please visit us on the web at [www.somervillema.gov](http://www.somervillema.gov). With that I open up the floor to any comments.

**Lisa Davidson** - Hi my name is Lisa Davidson and I am with the Somerville Homeless Coalition and I would just like to take this opportunity to thank your staff for putting this presentation together and for their continued support of our organization. It's great to see all of this information gathered and presented in one place like this. It really gives you an appreciation for how important this funding is and how much we can accomplish with it. That's it Thank you.

**Alan Inacio** – Great looks like that's it for comments. Thank you again to everyone for attending and have a great night.

## Alan Inacio

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**From:** Alan Inacio  
**Sent:** Monday, September 09, 2013 9:17 AM  
**To:** 'Community Access project'  
**Cc:** Jayne Gulla  
**Subject:** RE: Requesting CAPER PY2012-2013

Good Morning,

Thank you for the inquiry. The CAPER will be posted to the City Website this week. Please feel free to contact us with any additional questions.

Regards,

Alan Inacio  
Sr. Accountant  
Office of Strategic Planning and Community Development

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**From:** Community Access project [mailto:CAPSom@verizon.net]  
**Sent:** Sunday, September 08, 2013 11:46 PM  
**To:** Alan Inacio  
**Subject:** Requesting CAPER PY2012-2013

for receipt 9/9/13

Dear Alan Inacio,

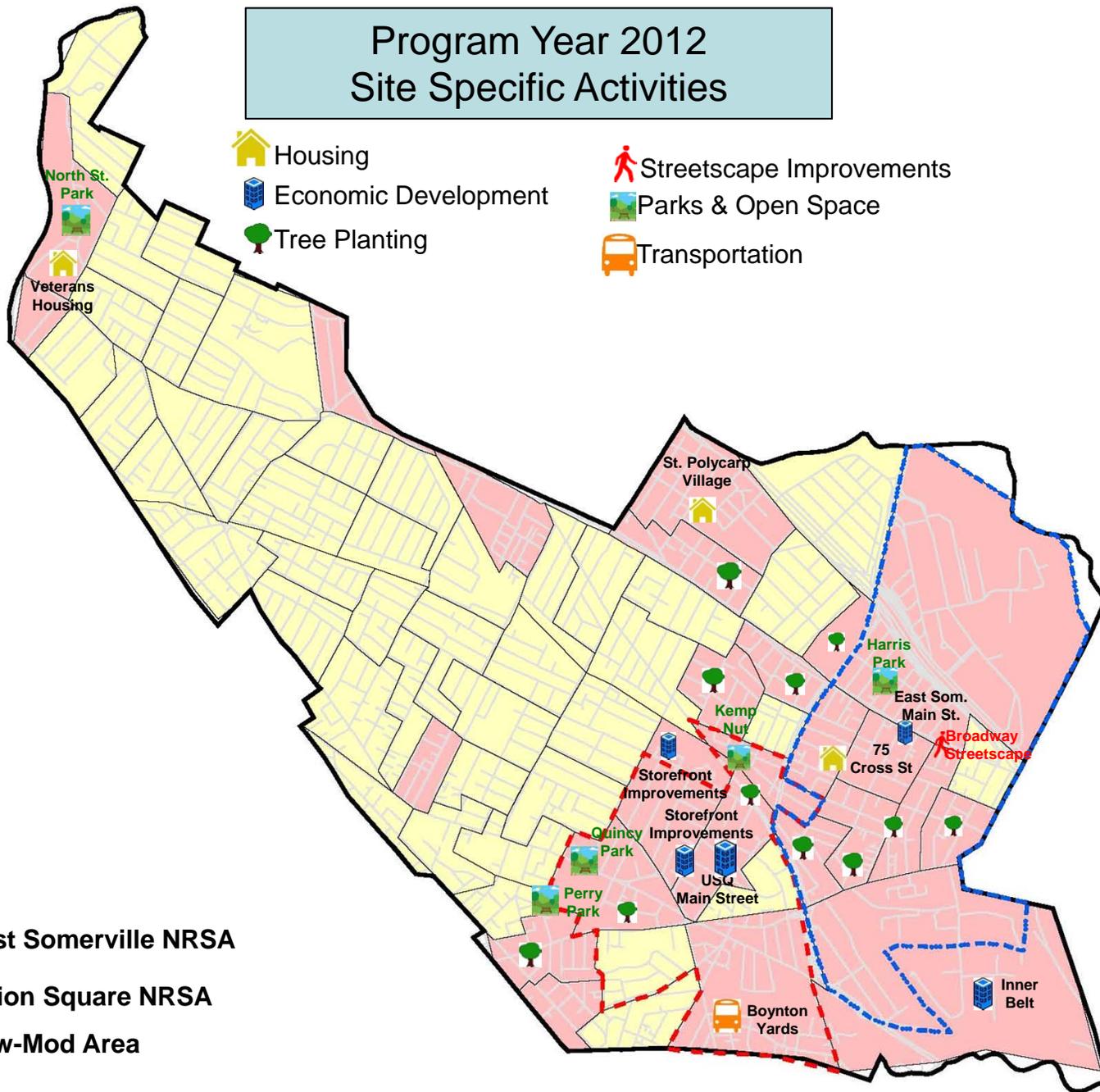
Will the 2012-2013 CAPER be added to OSPCD's website for public review this week?

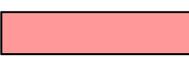
If not, would you please email that report to this address: CAPSom@verizon.net

Thanks very much,  
Eileen Feldman, W3 Somerville

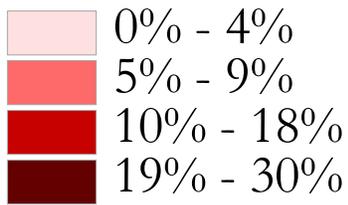
# Program Year 2012 Site Specific Activities

-  Housing
-  Economic Development
-  Tree Planting
-  Streetscape Improvements
-  Parks & Open Space
-  Transportation

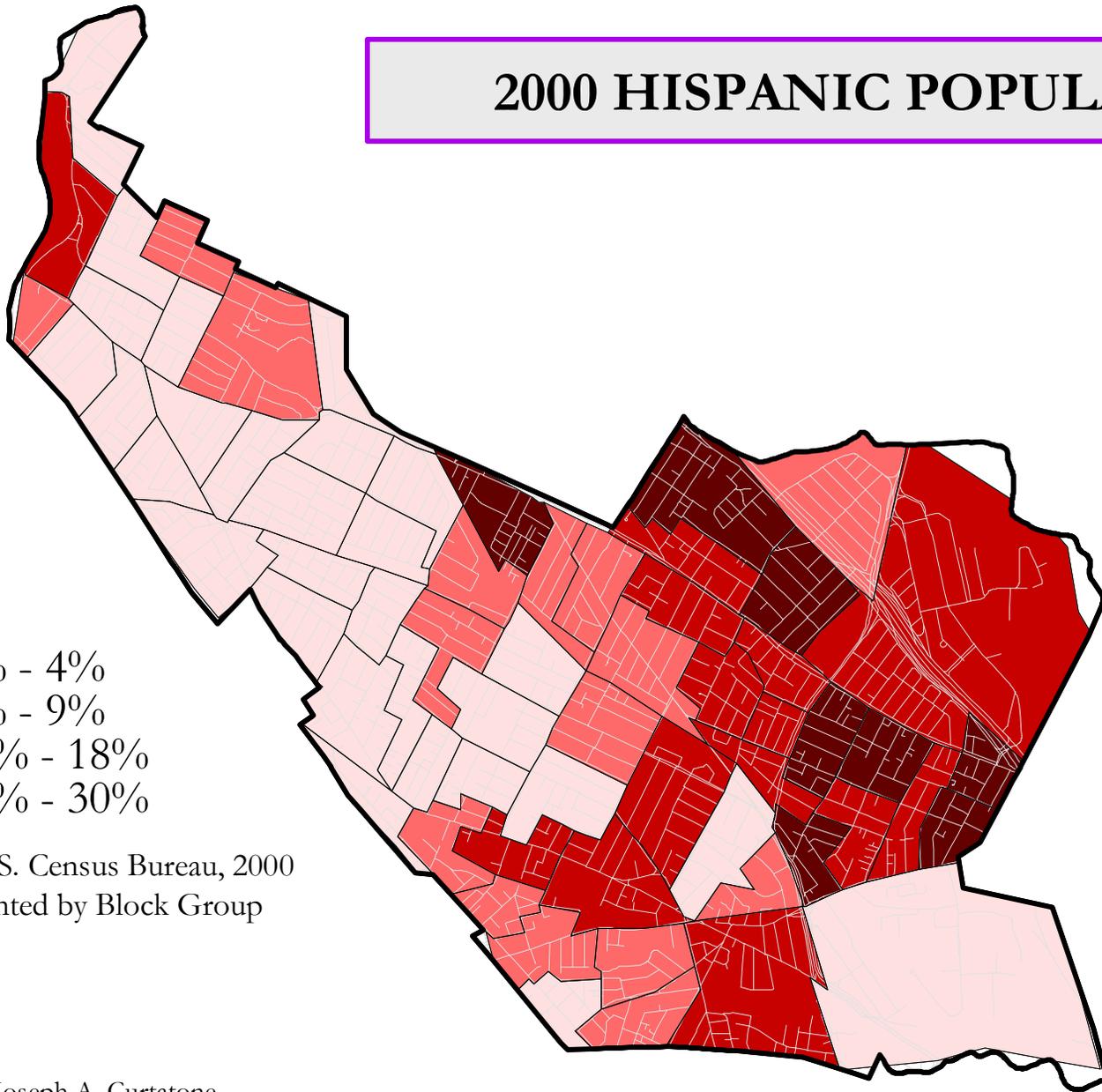


-  East Somerville NRSA
-  Union Square NRSA
-  Low-Mod Area

# 2000 HISPANIC POPULATION



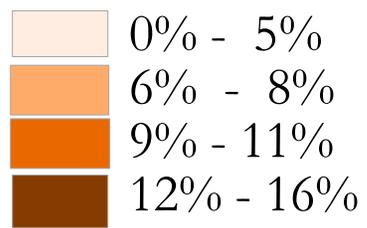
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



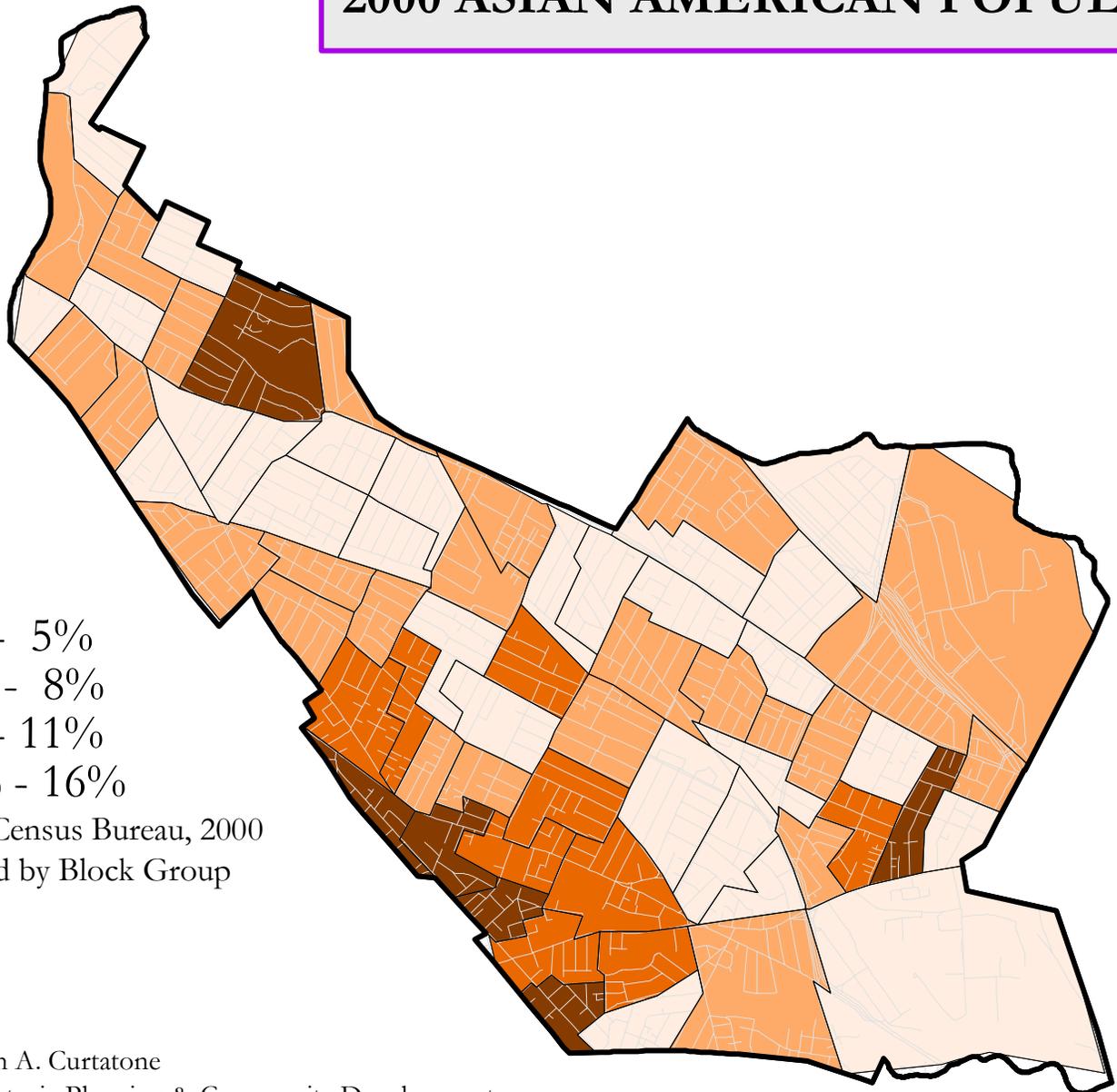
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# 2000 ASIAN AMERICAN POPULATION

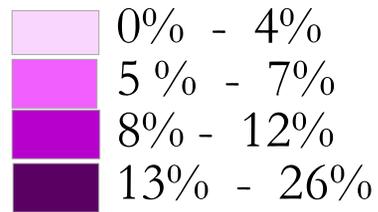


Source: U.S. Census Bureau, 2000  
Data presented by Block Group

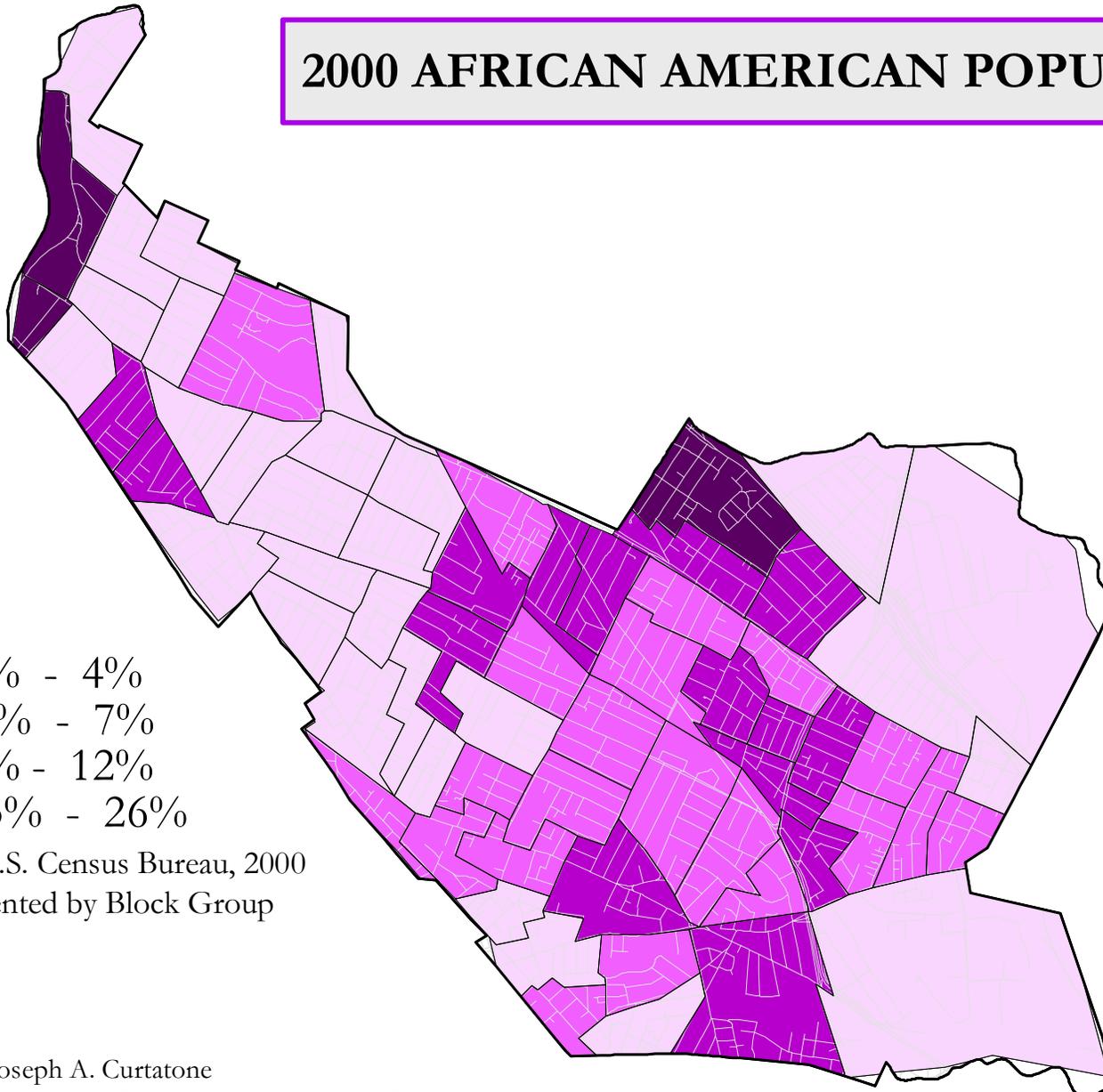


Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville

# 2000 AFRICAN AMERICAN POPULATION



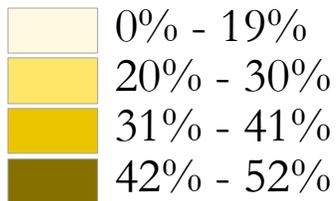
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



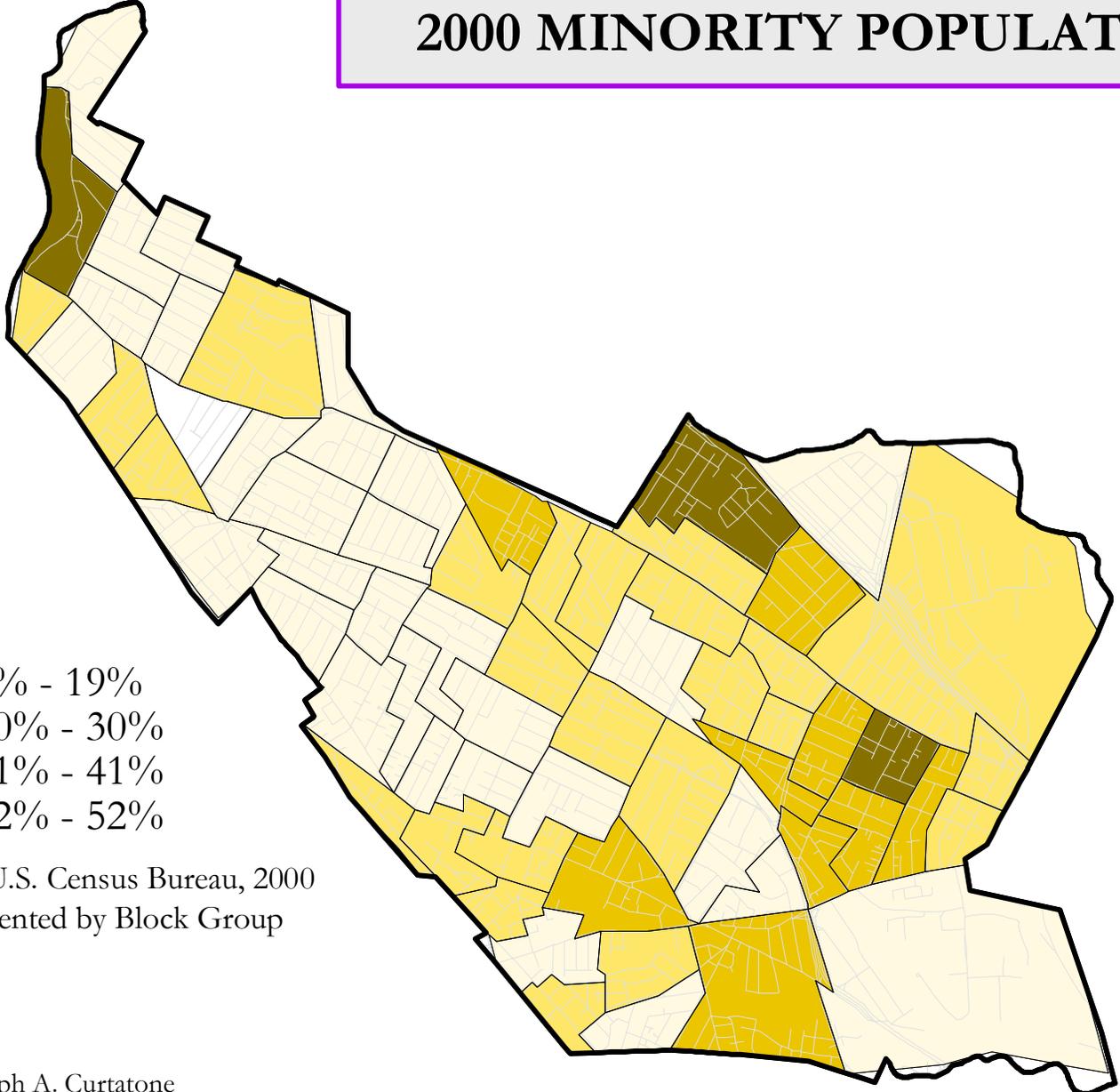
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# 2000 MINORITY POPULATION



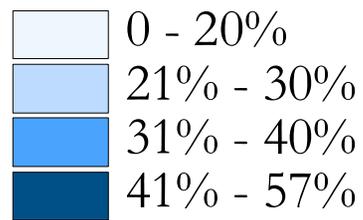
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



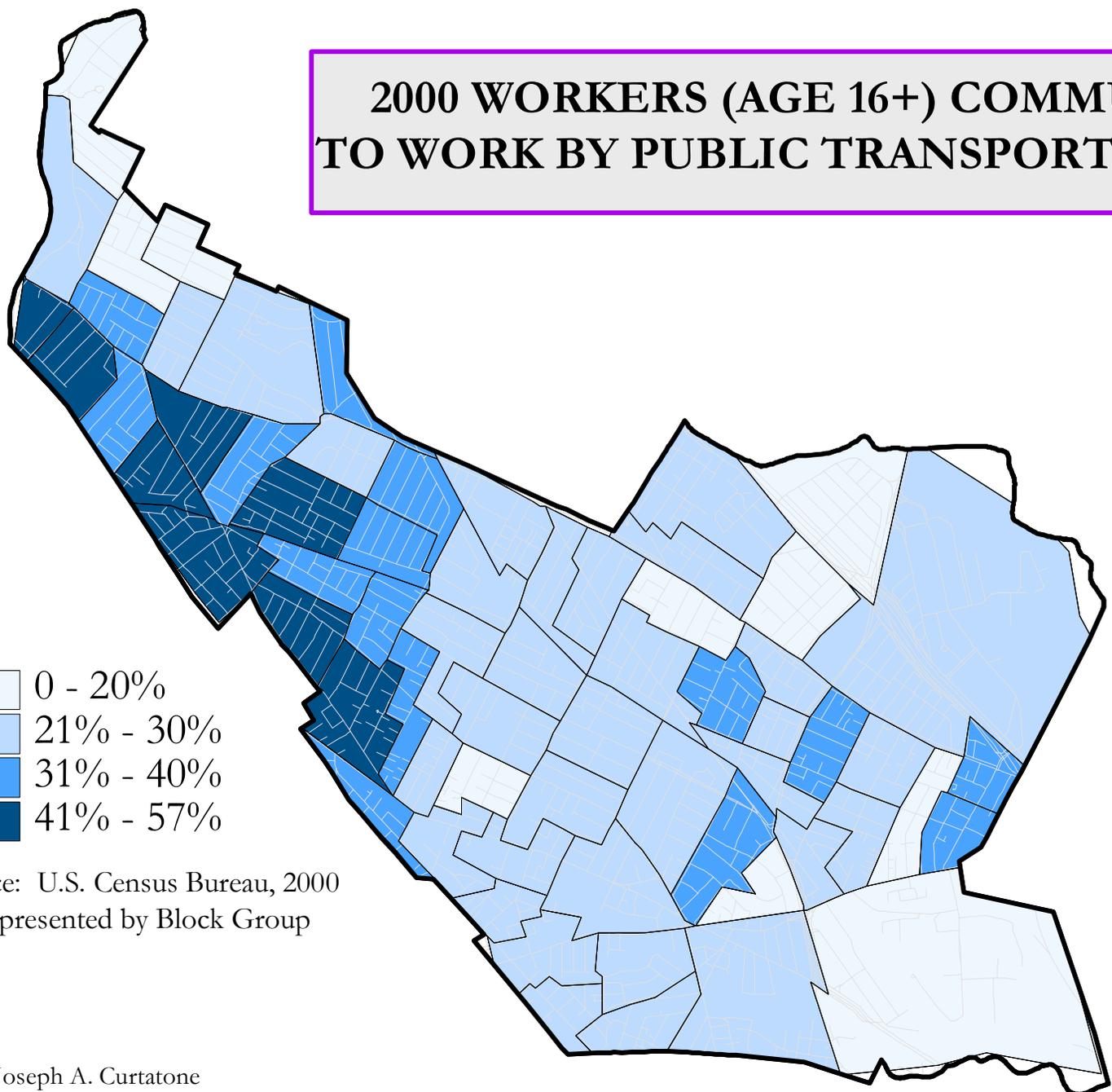
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# 2000 WORKERS (AGE 16+) COMMUTE TO WORK BY PUBLIC TRANSPORTATION



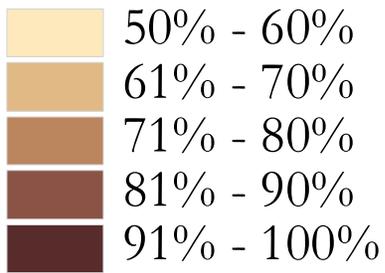
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



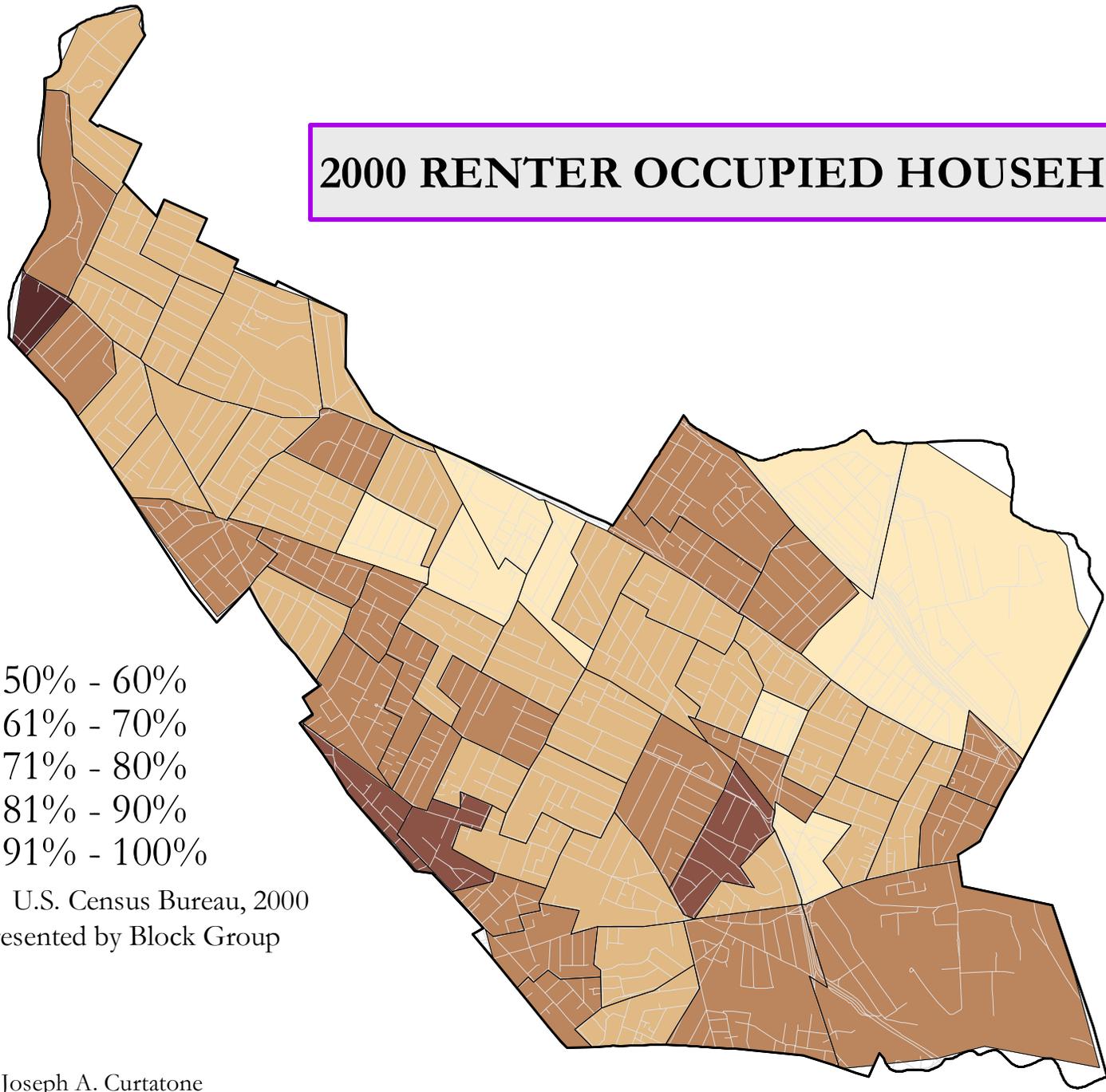
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# 2000 RENTER OCCUPIED HOUSEHOLDS



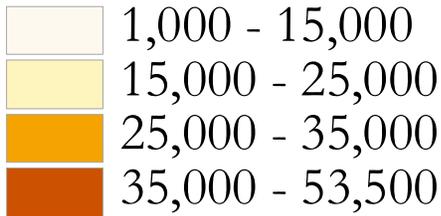
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



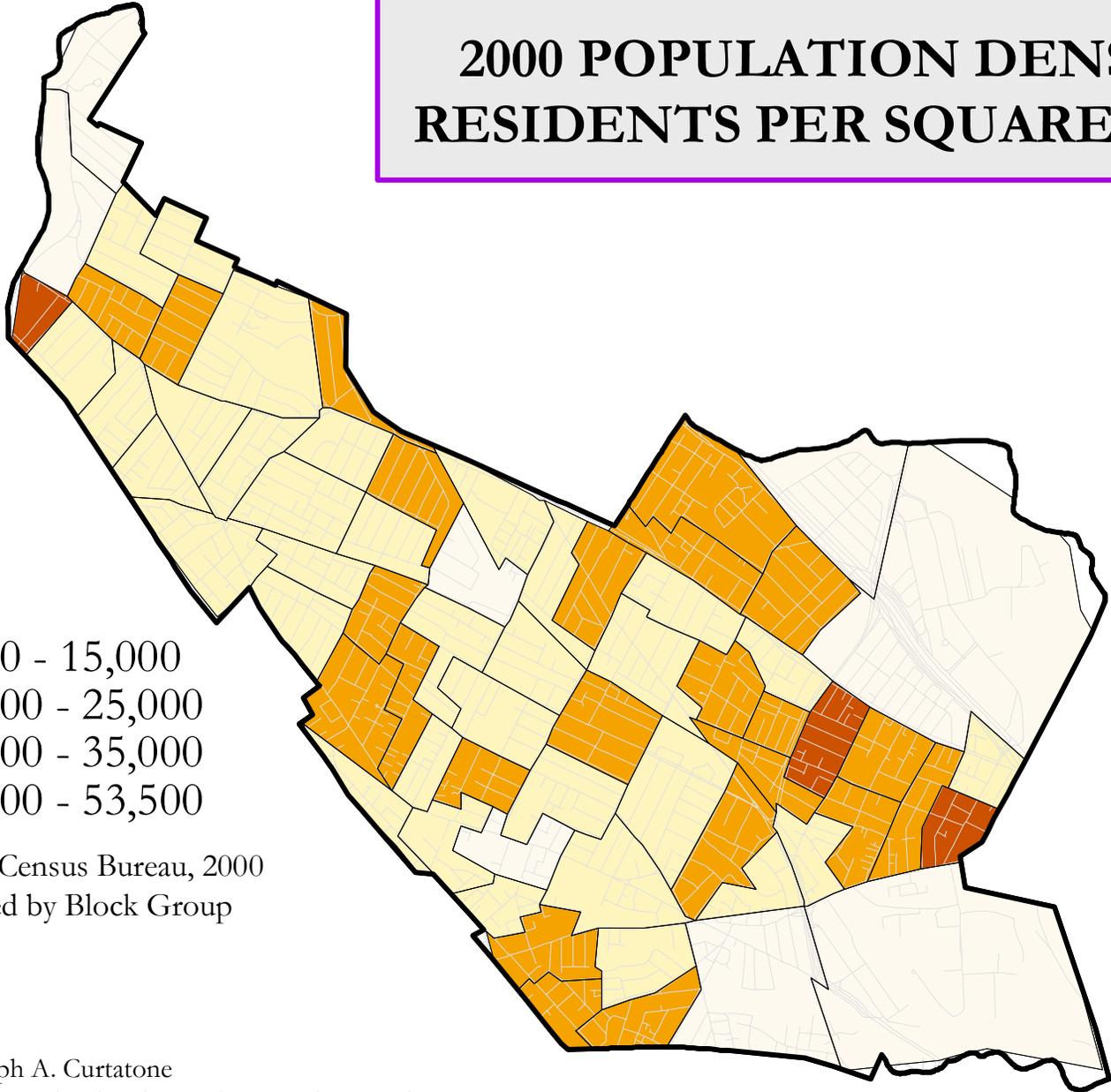
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
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# 2000 POPULATION DENSITY RESIDENTS PER SQUARE MILE



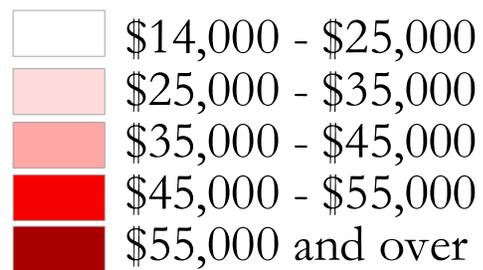
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



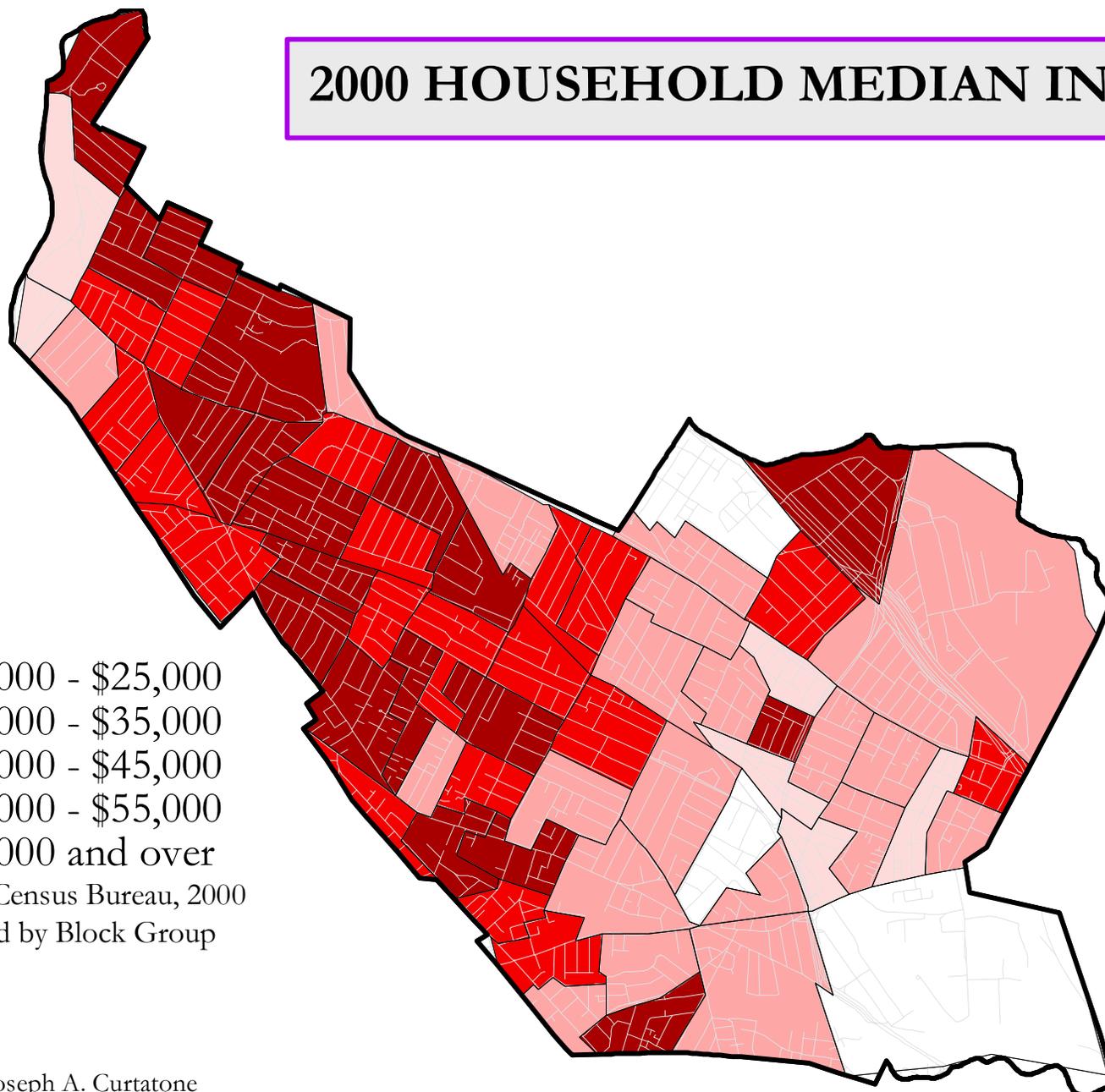
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
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# 2000 HOUSEHOLD MEDIAN INCOME



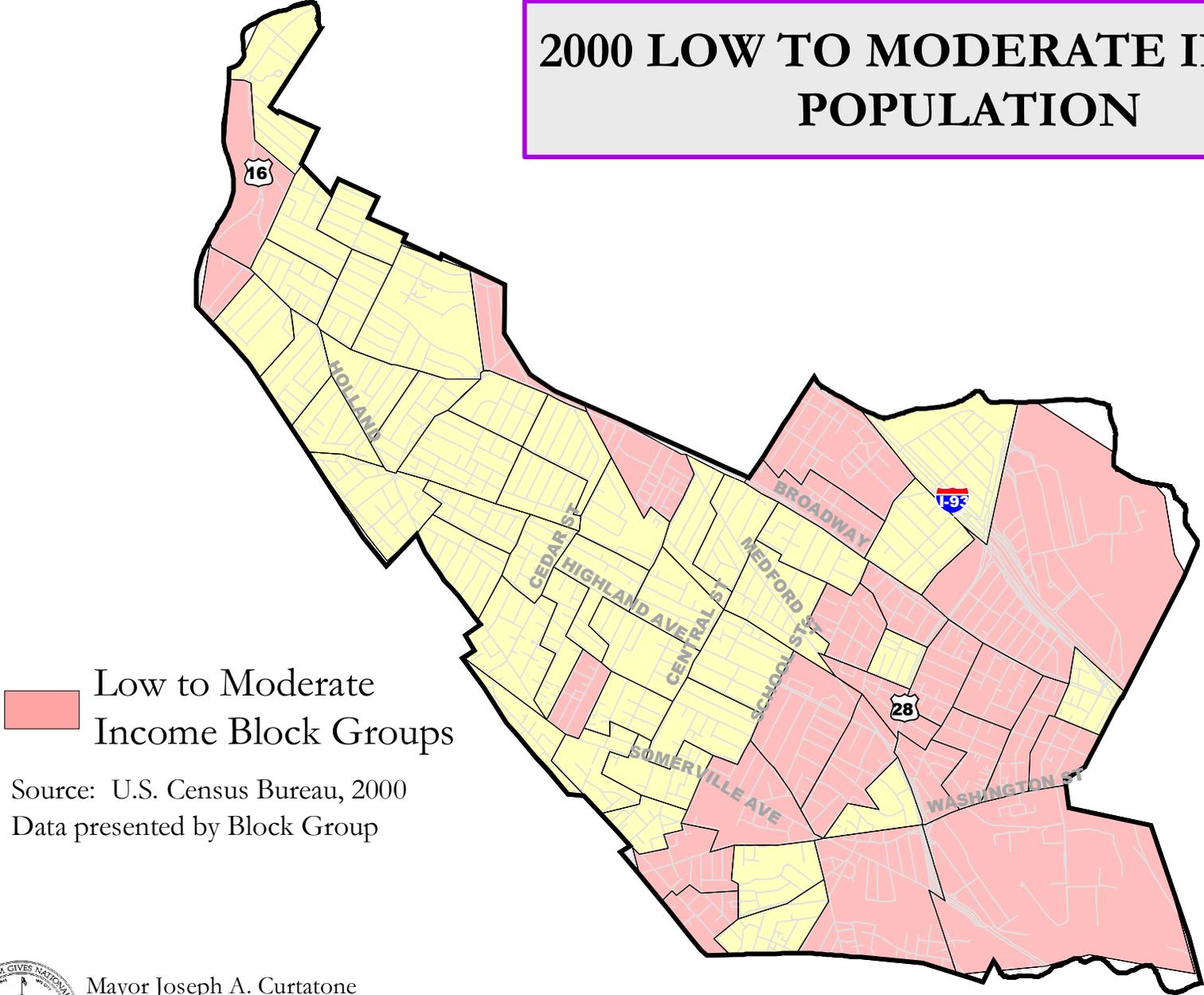
Source: U.S. Census Bureau, 2000  
Data presented by Block Group



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Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# 2000 LOW TO MODERATE INCOME POPULATION



Low to Moderate  
Income Block Groups

Source: U.S. Census Bureau, 2000  
Data presented by Block Group



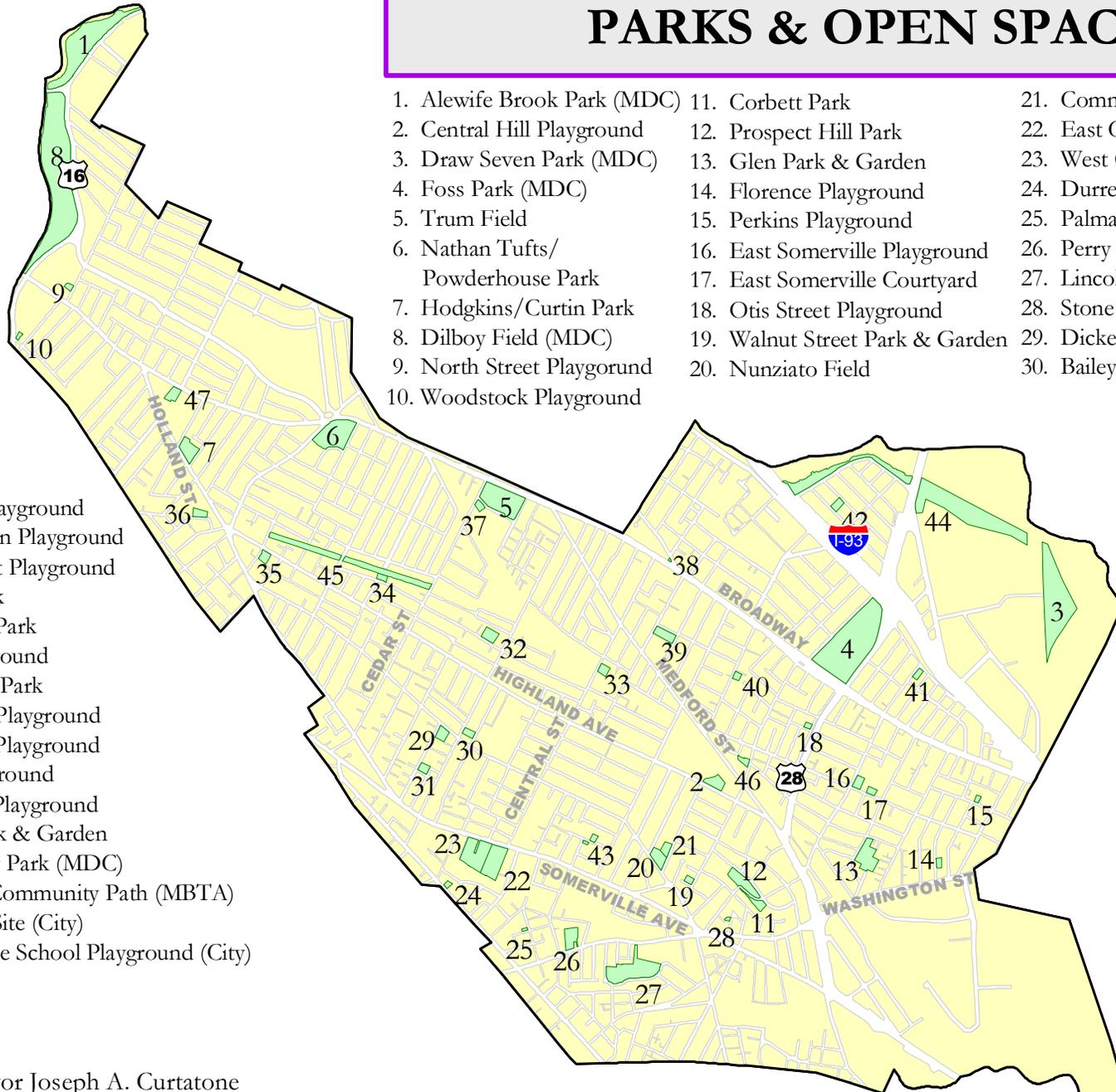
Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# PARKS & OPEN SPACE

- |                                      |                                 |                              |
|--------------------------------------|---------------------------------|------------------------------|
| 1. Alewife Brook Park (MDC)          | 11. Corbett Park                | 21. Community Growing Center |
| 2. Central Hill Playground           | 12. Prospect Hill Park          | 22. East Conway Park         |
| 3. Draw Seven Park (MDC)             | 13. Glen Park & Garden          | 23. West Conway Park         |
| 4. Foss Park (MDC)                   | 14. Florence Playground         | 24. Durrell Playground       |
| 5. Trum Field                        | 15. Perkins Playground          | 25. Palmacci Playground      |
| 6. Nathan Tufts/<br>Powderhouse Park | 16. East Somerville Playground  | 26. Perry Park               |
| 7. Hodgkins/Curtin Park              | 17. East Somerville Courtyard   | 27. Lincoln Park & Garden    |
| 8. Dilboy Field (MDC)                | 18. Otis Street Playground      | 28. Stone Place Playground   |
| 9. North Street Playgorund           | 19. Walnut Street Park & Garden | 29. Dickerman Playground     |
| 10. Woodstock Playground             | 20. Nunziato Field              | 30. Bailey Park              |

- 32. Albion St Playground
- 33. Hoyt-Sullivan Playground
- 34. Lexington St Playground
- 35. Kenney Park
- 36. Seven Hills Park
- 37. Trum Playground
- 38. Paul Revere Park
- 39. Winter Hill Playground
- 40. Marshall St Playground
- 41. Harris Playground
- 42. Grimmons Playground
- 43. Osgood Park & Garden
- 44. Mystic River Park (MDC)
- 45. Somerville Community Path (MBTA)
- 46. Kemp Nut Site (City)
- 47. Powderhouse School Playground (City)



Mayor Joseph A. Curtatone  
 Office of Strategic Planning & Community Development  
 Mapping prepared by City of Somerville



# INDUSTRIAL REVITALIZATION AREAS



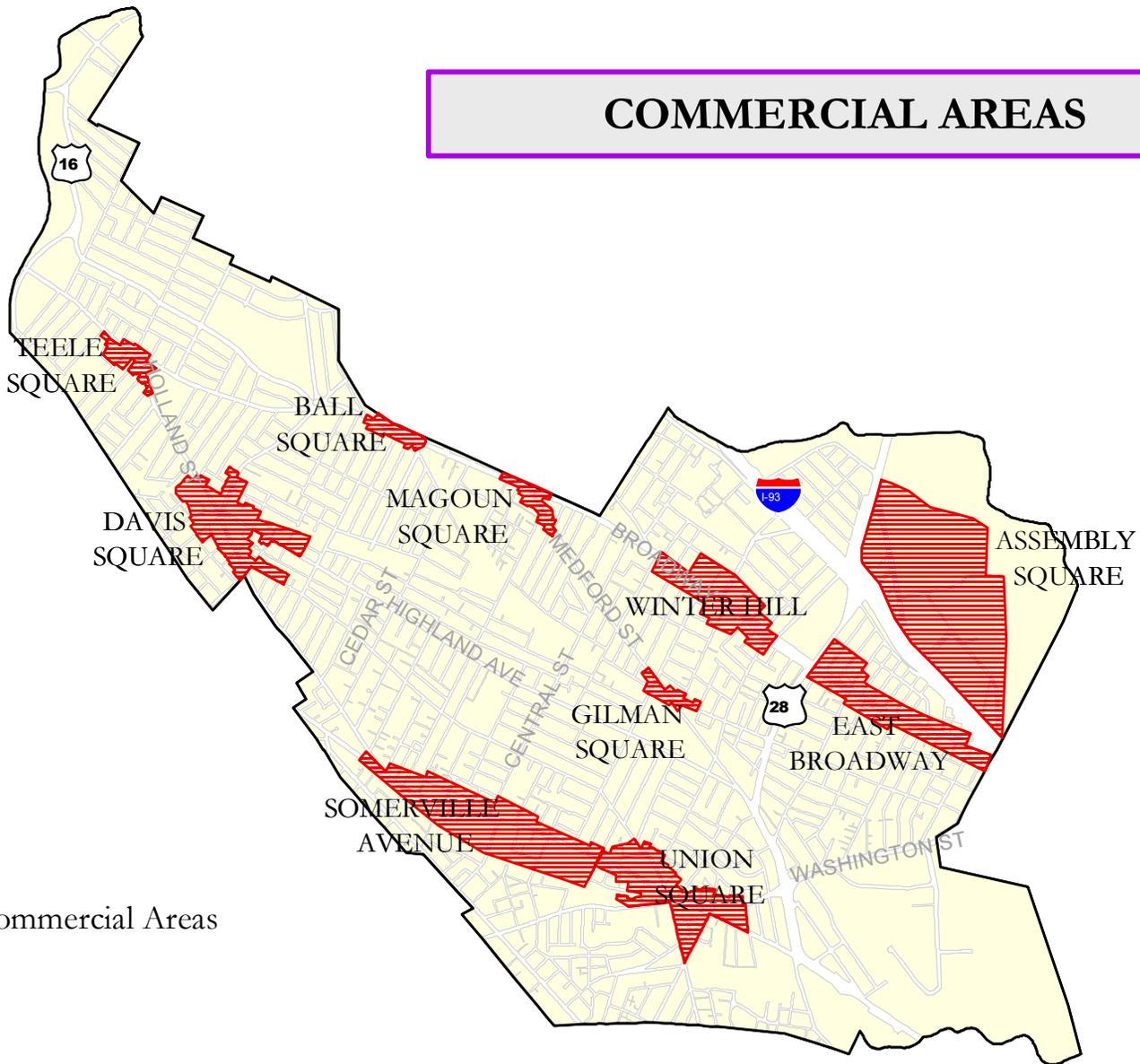
 Industrial Revitalization Areas



Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# COMMERCIAL AREAS



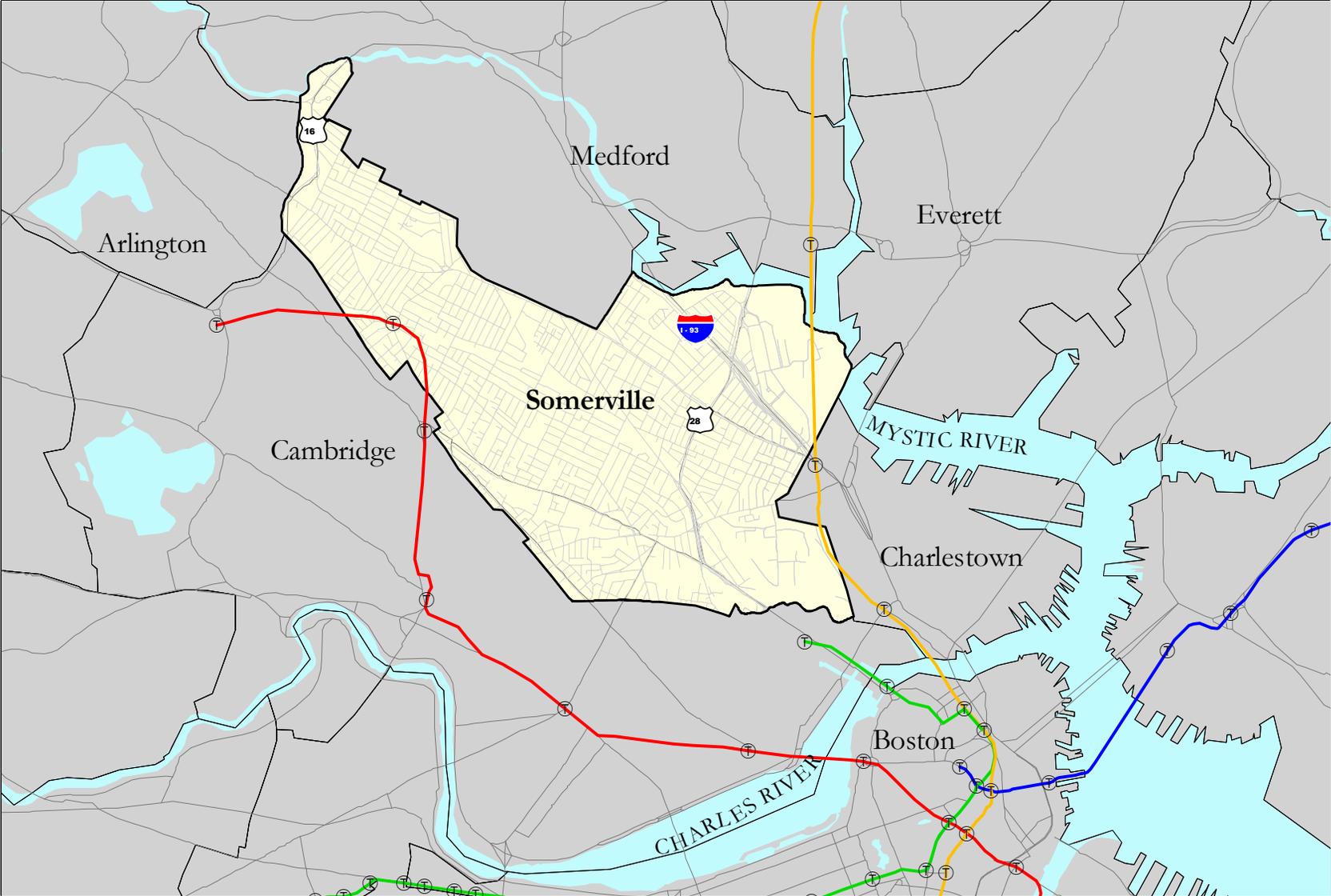
 Commercial Areas



Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# REGIONAL CONTEXT



Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville



# SOCIAL SERVICES

## Social Service Locations

- Health
- Family
- Youth
- Diversity
- Self Sufficiency

HUD Eligible Block Groups

Source: U.S. Census Bureau, 2000  
Data presented by Block Group



Mayor Joseph A. Curtatone  
Office of Strategic Planning & Community Development  
Mapping prepared by City of Somerville





U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System  
**Status of HOME Grants**  
**SOMERVILLE**

DATE: 07-01-13  
 TIME: 9:50  
 PAGE: 1

IDIS - PR27

**Commitments from Authorized Funds**

(A) Fiscal Year	(B) Total Authorization	(C) Admin/OP Reservation	(E) CR/CC Funds- Amount Reserved to CHDOS	(F) % CHDO Rsvd	(G) SU Funds- Reservations to Other Entities	(H) EN Funds-PJ Committed to Activities	(I) Total Authorized Commitments	(K) % of Auth Cmtd
1992	\$924,000.00	\$138,600.00	\$233,543.15	25.2%	\$0.00	\$551,856.85	\$924,000.00	100.0%
1993	\$612,000.00	\$91,800.00	\$369,228.00	60.3%	\$0.00	\$150,972.00	\$612,000.00	100.0%
1994	\$609,000.00	\$91,350.00	\$91,350.00	15.0%	\$0.00	\$426,300.00	\$609,000.00	100.0%
1995	\$659,000.00	\$98,850.00	\$98,850.00	15.0%	\$0.00	\$461,300.00	\$659,000.00	100.0%
1996	\$668,000.00	\$100,200.00	\$100,900.00	15.1%	\$0.00	\$466,900.00	\$668,000.00	100.0%
1997	\$651,000.00	\$97,650.00	\$98,350.00	15.1%	\$0.00	\$455,000.00	\$651,000.00	100.0%
1998	\$702,000.00	\$105,300.00	\$105,300.00	15.0%	\$0.00	\$491,400.00	\$702,000.00	100.0%
1999	\$753,000.00	\$112,950.00	\$381,069.34	50.6%	\$0.00	\$258,980.66	\$753,000.00	100.0%
2000	\$757,000.00	\$113,550.00	\$592,364.90	78.2%	\$0.00	\$51,085.10	\$757,000.00	100.0%
2001	\$841,000.00	\$126,150.00	\$576,424.00	68.5%	\$0.00	\$138,426.00	\$841,000.00	100.0%
2002	\$836,000.00	\$125,400.00	\$225,400.00	26.9%	\$0.00	\$485,200.00	\$836,000.00	100.0%
2003	\$988,134.00	\$148,220.10	\$265,357.00	26.8%	\$0.00	\$574,556.90	\$988,134.00	100.0%
2004	\$986,737.00	\$148,010.55	\$506,421.00	51.3%	\$0.00	\$332,305.45	\$986,737.00	100.0%
2005	\$951,220.00	\$142,683.00	\$749,739.45	78.8%	\$0.00	\$58,797.55	\$951,220.00	100.0%
2006	\$900,130.00	\$135,019.50	\$183,218.54	20.3%	\$0.00	\$581,891.96	\$900,130.00	100.0%
2007	\$895,360.00	\$134,304.00	\$310,035.96	34.6%	\$0.00	\$451,020.04	\$895,360.00	100.0%
2008	\$865,389.00	\$129,808.35	\$345,422.61	39.9%	\$0.00	\$390,158.04	\$865,389.00	100.0%
2009	\$967,305.00	\$145,095.75	\$643,781.25	66.5%	\$0.00	\$178,428.00	\$967,305.00	100.0%
2010	\$961,761.00	\$144,264.15	\$358,873.27	37.3%	\$0.00	\$268,152.30	\$771,289.72	80.1%
2011	\$850,413.00	\$127,561.95	\$127,561.95	15.0%	\$0.00	\$0.00	\$255,123.90	30.0%
2012	\$480,840.00	\$48,084.00	\$0.00	0.0%	\$0.00	\$0.00	\$48,084.00	10.0%
<b>Total</b>	<b>\$16,859,289.00</b>	<b>\$2,504,851.35</b>	<b>\$6,363,190.42</b>	<b>37.7%</b>	<b>\$0.00</b>	<b>\$6,772,730.85</b>	<b>\$15,640,772.62</b>	<b>92.7%</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Program Income (PI)**

Fiscal Year	Program Income Receipts	Amount Committed to Activities	% Committed	Net Disbursed	Disbursed Pending Approval	Total Disbursed	% Disbursed
1992	0.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%
1993	0.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%
1994	0.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%
1995	0.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%
1996	0.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%
1997	0.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%
1998	75,300.00	\$75,300.00	100.0%	\$75,300.00	\$0.00	\$75,300.00	100.0%
1999	613,001.00	\$613,001.00	100.0%	\$613,001.00	\$0.00	\$613,001.00	100.0%
2000	118,650.00	\$118,650.00	100.0%	\$118,650.00	\$0.00	\$118,650.00	100.0%
2001	244,460.00	\$244,460.00	100.0%	\$244,460.00	\$0.00	\$244,460.00	100.0%
2002	93,165.00	\$93,165.00	100.0%	\$93,165.00	\$0.00	\$93,165.00	100.0%
2003	341,731.00	\$341,731.00	100.0%	\$341,731.00	\$0.00	\$341,731.00	100.0%
2004	135,275.00	\$135,275.00	100.0%	\$135,275.00	\$0.00	\$135,275.00	100.0%
2005	163,606.24	\$163,606.24	100.0%	\$163,606.24	\$0.00	\$163,606.24	100.0%
2006	107,389.03	\$107,389.03	100.0%	\$107,389.03	\$0.00	\$107,389.03	100.0%
2007	96,253.43	\$96,253.43	100.0%	\$96,253.43	\$0.00	\$96,253.43	100.0%
2008	97,937.21	\$97,937.21	100.0%	\$97,937.21	\$0.00	\$97,937.21	100.0%
2009	111,275.64	\$111,275.64	100.0%	\$111,275.64	\$0.00	\$111,275.64	100.0%
2010	63,121.85	\$63,121.85	100.0%	\$63,121.85	\$0.00	\$63,121.85	100.0%
2011	74,478.00	\$74,478.00	100.0%	\$74,478.00	\$0.00	\$74,478.00	100.0%
2012	45,674.49	\$44,764.92	98.0%	\$36,225.00	\$7,981.92	\$44,206.92	96.7%
<b>Total</b>	<b>2,381,317.89</b>	<b>\$2,380,408.32</b>	<b>99.9%</b>	<b>\$2,371,868.40</b>	<b>\$7,981.92</b>	<b>\$2,379,850.32</b>	<b>99.9%</b>



U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System

DATE: 07-01-13  
 TIME: 9:50  
 PAGE: 3

**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Disbursements**

(A) Fiscal Year	(B) Total Authorization	(C) Disbursed	(D) Returned	(E) Net Disbursed	(F) Disbursed Pending Approval	(G) Total Disbursed	(H) % Disb	(I) Grant Balance
1992	\$924,000.00	\$924,000.00	\$0.00	\$924,000.00	\$0.00	924,000.00	100.0%	\$0.00
1993	\$612,000.00	\$612,000.00	\$0.00	\$612,000.00	\$0.00	612,000.00	100.0%	\$0.00
1994	\$609,000.00	\$609,000.00	\$0.00	\$609,000.00	\$0.00	609,000.00	100.0%	\$0.00
1995	\$659,000.00	\$659,000.00	\$0.00	\$659,000.00	\$0.00	659,000.00	100.0%	\$0.00
1996	\$668,000.00	\$668,000.00	\$0.00	\$668,000.00	\$0.00	668,000.00	100.0%	\$0.00
1997	\$651,000.00	\$651,000.00	\$0.00	\$651,000.00	\$0.00	651,000.00	100.0%	\$0.00
1998	\$702,000.00	\$702,000.00	\$0.00	\$702,000.00	\$0.00	702,000.00	100.0%	\$0.00
1999	\$753,000.00	\$753,000.00	\$0.00	\$753,000.00	\$0.00	753,000.00	100.0%	\$0.00
2000	\$757,000.00	\$757,000.00	\$0.00	\$757,000.00	\$0.00	757,000.00	100.0%	\$0.00
2001	\$841,000.00	\$841,000.00	\$0.00	\$841,000.00	\$0.00	841,000.00	100.0%	\$0.00
2002	\$836,000.00	\$836,000.00	\$0.00	\$836,000.00	\$0.00	836,000.00	100.0%	\$0.00
2003	\$988,134.00	\$988,134.00	\$0.00	\$988,134.00	\$0.00	988,134.00	100.0%	\$0.00
2004	\$986,737.00	\$986,737.00	\$0.00	\$986,737.00	\$0.00	986,737.00	100.0%	\$0.00
2005	\$951,220.00	\$951,220.00	\$0.00	\$951,220.00	\$0.00	951,220.00	100.0%	\$0.00
2006	\$900,130.00	\$900,130.00	\$0.00	\$900,130.00	\$0.00	900,130.00	100.0%	\$0.00
2007	\$895,360.00	\$895,360.00	\$0.00	\$895,360.00	\$0.00	895,360.00	100.0%	\$0.00
2008	\$865,389.00	\$865,389.00	\$0.00	\$865,389.00	\$0.00	865,389.00	100.0%	\$0.00
2009	\$967,305.00	\$967,305.00	\$0.00	\$967,305.00	\$0.00	967,305.00	100.0%	\$0.00
2010	\$961,761.00	\$606,730.36	\$0.00	\$606,730.36	\$18,794.13	625,524.49	65.0%	\$336,236.51
2011	\$850,413.00	\$171,226.90	\$0.00	\$171,226.90	\$0.00	171,226.90	20.1%	\$679,186.10
2012	\$480,840.00	\$43,716.25	\$0.00	\$43,716.25	\$1,692.35	45,408.60	9.4%	\$435,431.40
<b>Total</b>	<b>\$16,859,289.00</b>	<b>\$15,387,948.51</b>	<b>\$0.00</b>	<b>\$15,387,948.51</b>	<b>\$20,486.48</b>	<b>15,408,434.99</b>	<b>91.3%</b>	<b>\$1,450,854.01</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Home Activities Commitments/Disbursements**

(A) Fiscal Year	(B) Authorized for Activities	(C) Amount Committed to Activities	(D) % Cmtd	(E) Disbursed	(F) Returned	(G) Net Disbursed	(H) % Net Disb	(I) Disbursed Pending Approval	(J) Total Disbursed	(K) % Disb
1992	\$785,400.00	\$785,400.00	100.0%	\$785,400.00	\$0.00	\$785,400.00	100.0%	\$0.00	\$785,400.00	100.0%
1993	\$520,200.00	\$520,200.00	100.0%	\$520,200.00	\$0.00	\$520,200.00	100.0%	\$0.00	\$520,200.00	100.0%
1994	\$517,650.00	\$517,650.00	100.0%	\$517,650.00	\$0.00	\$517,650.00	100.0%	\$0.00	\$517,650.00	100.0%
1995	\$560,150.00	\$560,150.00	100.0%	\$560,150.00	\$0.00	\$560,150.00	100.0%	\$0.00	\$560,150.00	100.0%
1996	\$567,800.00	\$567,800.00	100.0%	\$567,800.00	\$0.00	\$567,800.00	100.0%	\$0.00	\$567,800.00	100.0%
1997	\$553,350.00	\$553,350.00	100.0%	\$553,350.00	\$0.00	\$553,350.00	100.0%	\$0.00	\$553,350.00	100.0%
1998	\$596,700.00	\$596,700.00	100.0%	\$596,700.00	\$0.00	\$596,700.00	100.0%	\$0.00	\$596,700.00	100.0%
1999	\$640,050.00	\$640,050.00	100.0%	\$640,050.00	\$0.00	\$640,050.00	100.0%	\$0.00	\$640,050.00	100.0%
2000	\$643,450.00	\$643,450.00	100.0%	\$643,450.00	\$0.00	\$643,450.00	100.0%	\$0.00	\$643,450.00	100.0%
2001	\$714,850.00	\$714,850.00	100.0%	\$714,850.00	\$0.00	\$714,850.00	100.0%	\$0.00	\$714,850.00	100.0%
2002	\$710,600.00	\$710,600.00	100.0%	\$710,600.00	\$0.00	\$710,600.00	100.0%	\$0.00	\$710,600.00	100.0%
2003	\$839,913.90	\$839,913.90	100.0%	\$839,913.90	\$0.00	\$839,913.90	100.0%	\$0.00	\$839,913.90	100.0%
2004	\$838,726.45	\$838,726.45	100.0%	\$838,726.45	\$0.00	\$838,726.45	100.0%	\$0.00	\$838,726.45	100.0%
2005	\$808,537.00	\$808,537.00	100.0%	\$808,537.00	\$0.00	\$808,537.00	100.0%	\$0.00	\$808,537.00	100.0%
2006	\$765,110.50	\$765,110.50	100.0%	\$765,110.50	\$0.00	\$765,110.50	100.0%	\$0.00	\$765,110.50	100.0%
2007	\$761,056.00	\$761,056.00	100.0%	\$761,056.00	\$0.00	\$761,056.00	100.0%	\$0.00	\$761,056.00	100.0%
2008	\$735,580.65	\$735,580.65	100.0%	\$735,580.65	\$0.00	\$735,580.65	100.0%	\$0.00	\$735,580.65	100.0%
2009	\$822,209.25	\$822,209.25	100.0%	\$822,209.25	\$0.00	\$822,209.25	100.0%	\$0.00	\$822,209.25	100.0%
2010	\$817,496.85	\$627,025.57	76.7%	\$462,466.21	\$0.00	\$462,466.21	56.5%	\$18,794.13	\$481,260.34	58.8%
2011	\$722,851.05	\$114,164.95	15.7%	\$43,664.95	\$0.00	\$43,664.95	6.0%	\$0.00	\$43,664.95	6.0%
2012	\$432,756.00	\$0.00	0.0%	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%
<b>Total</b>	<b>\$14,354,437.65</b>	<b>\$13,122,524.27</b>	<b>91.4%</b>	<b>\$12,887,464.91</b>	<b>\$0.00</b>	<b>\$12,887,464.91</b>	<b>89.7%</b>	<b>\$18,794.13</b>	<b>\$12,906,259.04</b>	<b>89.9%</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Administrative Funds (AD)**

Fiscal Year	Authorized Amount	Amount Authorized from PI	Amount Reserved	% Auth Rsvd	Balance to Reserve	Total Disbursed	% Rsvd Disb	Available to Disburse
1992	\$92,400.00	\$0.00	\$92,400.00	100.0%	\$0.00	\$92,400.00	100.0%	\$0.00
1993	\$61,200.00	\$0.00	\$61,200.00	100.0%	\$0.00	\$61,200.00	100.0%	\$0.00
1994	\$60,900.00	\$0.00	\$60,900.00	100.0%	\$0.00	\$60,900.00	100.0%	\$0.00
1995	\$65,900.00	\$0.00	\$65,900.00	100.0%	\$0.00	\$65,900.00	100.0%	\$0.00
1996	\$66,800.00	\$0.00	\$66,800.00	100.0%	\$0.00	\$66,800.00	100.0%	\$0.00
1997	\$65,100.00	\$0.00	\$65,100.00	100.0%	\$0.00	\$65,100.00	100.0%	\$0.00
1998	\$70,200.00	\$7,530.00	\$70,200.00	90.3%	\$0.00	\$70,200.00	100.0%	\$0.00
1999	\$75,300.00	\$61,300.10	\$75,300.00	55.1%	\$0.00	\$75,300.00	100.0%	\$0.00
2000	\$75,700.00	\$11,865.00	\$75,700.00	86.4%	\$0.00	\$75,700.00	100.0%	\$0.00
2001	\$84,100.00	\$24,446.00	\$84,100.00	77.4%	\$0.00	\$84,100.00	100.0%	\$0.00
2002	\$83,600.00	\$9,316.50	\$83,600.00	89.9%	\$0.00	\$83,600.00	100.0%	\$0.00
2003	\$98,813.40	\$34,173.10	\$98,813.40	74.3%	\$0.00	\$98,813.40	100.0%	\$0.00
2004	\$98,673.70	\$13,527.50	\$98,673.70	87.9%	\$0.00	\$98,673.70	100.0%	\$0.00
2005	\$95,122.00	\$16,360.62	\$95,122.00	85.3%	\$0.00	\$95,122.00	100.0%	\$0.00
2006	\$90,013.00	\$10,738.90	\$90,013.00	89.3%	\$0.00	\$90,013.00	100.0%	\$0.00
2007	\$89,536.00	\$9,625.34	\$89,536.00	90.2%	\$0.00	\$89,536.00	100.0%	\$0.00
2008	\$86,538.90	\$9,793.72	\$86,538.90	89.8%	\$0.00	\$86,538.90	100.0%	\$0.00
2009	\$96,730.50	\$11,127.56	\$96,730.50	89.6%	\$0.00	\$96,730.50	100.0%	\$0.00
2010	\$99,986.10	\$6,312.18	\$96,176.10	90.4%	\$0.00	\$96,176.10	100.0%	\$0.00
2011	\$85,041.30	\$7,447.80	\$85,041.30	91.9%	\$0.00	\$85,041.30	100.0%	\$0.00
2012	\$48,084.00	\$4,567.44	\$48,084.00	91.3%	\$4,567.44	\$45,408.60	94.4%	\$2,675.40
<b>Total</b>	<b>\$1,689,738.90</b>	<b>\$238,131.76</b>	<b>\$1,685,928.90</b>	<b>87.4%</b>	<b>\$4,567.44</b>	<b>\$1,683,253.50</b>	<b>99.8%</b>	<b>\$2,675.40</b>



U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System

DATE: 07-01-13  
 TIME: 9:50  
 PAGE: 6

**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**CHDO Operating Funds (CO)**

Fiscal Year	Authorized Amount	Amount Reserved	% Auth Rsvd	Balance to Reserve	Total Disbursed	% Rsvd Disb	Available to Disburse
1992	\$46,200.00	\$46,200.00	100.0%	\$0.00	\$46,200.00	100.0%	\$0.00
1993	\$30,600.00	\$30,600.00	100.0%	\$0.00	\$30,600.00	100.0%	\$0.00
1994	\$30,450.00	\$30,450.00	100.0%	\$0.00	\$30,450.00	100.0%	\$0.00
1995	\$32,950.00	\$32,950.00	100.0%	\$0.00	\$32,950.00	100.0%	\$0.00
1996	\$33,400.00	\$33,400.00	100.0%	\$0.00	\$33,400.00	100.0%	\$0.00
1997	\$32,550.00	\$32,550.00	100.0%	\$0.00	\$32,550.00	100.0%	\$0.00
1998	\$35,100.00	\$35,100.00	100.0%	\$0.00	\$35,100.00	100.0%	\$0.00
1999	\$37,650.00	\$37,650.00	100.0%	\$0.00	\$37,650.00	100.0%	\$0.00
2000	\$37,850.00	\$37,850.00	100.0%	\$0.00	\$37,850.00	100.0%	\$0.00
2001	\$42,050.00	\$42,050.00	100.0%	\$0.00	\$42,050.00	100.0%	\$0.00
2002	\$41,800.00	\$41,800.00	100.0%	\$0.00	\$41,800.00	100.0%	\$0.00
2003	\$49,406.70	\$49,406.70	100.0%	\$0.00	\$49,406.70	100.0%	\$0.00
2004	\$49,336.85	\$49,336.85	100.0%	\$0.00	\$49,336.85	100.0%	\$0.00
2005	\$47,561.00	\$47,561.00	100.0%	\$0.00	\$47,561.00	100.0%	\$0.00
2006	\$45,006.50	\$45,006.50	100.0%	\$0.00	\$45,006.50	100.0%	\$0.00
2007	\$44,768.00	\$44,768.00	100.0%	\$0.00	\$44,768.00	100.0%	\$0.00
2008	\$43,269.45	\$43,269.45	100.0%	\$0.00	\$43,269.45	100.0%	\$0.00
2009	\$48,365.25	\$48,365.25	100.0%	\$0.00	\$48,365.25	100.0%	\$0.00
2010	\$48,088.05	\$48,088.05	100.0%	\$0.00	\$48,088.05	100.0%	\$0.00
2011	\$42,520.65	\$42,520.65	100.0%	\$0.00	\$42,520.65	100.0%	\$0.00
2012	\$24,042.00	\$0.00	0.0%	\$24,042.00	\$0.00	0.0%	\$0.00
<b>Total</b>	<b>\$842,964.45</b>	<b>\$818,922.45</b>	<b>97.1%</b>	<b>\$24,042.00</b>	<b>\$818,922.45</b>	<b>100.0%</b>	<b>\$0.00</b>



U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System

DATE: 07-01-13  
 TIME: 9:50  
 PAGE: 7

**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**CHDO Funds (CR)**

Fiscal Year	CHDO Requirement	Authorized Amount	Amount Reserved to CHDOS	% Req Rsvd	Unreserved CHDO Amount	Funds Committed to Activities	% Rsvd Cmtd	Balance to Commit	Total Disbursed	% Disb	Available to Disburse
1992	\$138,600.00	\$233,543.15	\$233,543.15	168.5%	\$0.00	\$233,543.15	100.0%	\$0.00	\$233,543.15	100.0%	\$0.00
1993	\$91,800.00	\$369,228.00	\$369,228.00	402.2%	\$0.00	\$369,228.00	100.0%	\$0.00	\$369,228.00	100.0%	\$0.00
1994	\$91,350.00	\$91,350.00	\$91,350.00	100.0%	\$0.00	\$91,350.00	100.0%	\$0.00	\$91,350.00	100.0%	\$0.00
1995	\$98,850.00	\$98,850.00	\$98,850.00	100.0%	\$0.00	\$98,850.00	100.0%	\$0.00	\$98,850.00	100.0%	\$0.00
1996	\$100,200.00	\$100,900.00	\$100,900.00	100.6%	\$0.00	\$100,900.00	100.0%	\$0.00	\$100,900.00	100.0%	\$0.00
1997	\$97,650.00	\$98,350.00	\$98,350.00	100.7%	\$0.00	\$98,350.00	100.0%	\$0.00	\$98,350.00	100.0%	\$0.00
1998	\$105,300.00	\$105,300.00	\$105,300.00	100.0%	\$0.00	\$105,300.00	100.0%	\$0.00	\$105,300.00	100.0%	\$0.00
1999	\$112,950.00	\$381,069.34	\$381,069.34	337.3%	\$0.00	\$381,069.34	100.0%	\$0.00	\$381,069.34	100.0%	\$0.00
2000	\$113,550.00	\$592,364.90	\$592,364.90	521.6%	\$0.00	\$592,364.90	100.0%	\$0.00	\$592,364.90	100.0%	\$0.00
2001	\$126,150.00	\$576,424.00	\$576,424.00	456.9%	\$0.00	\$576,424.00	100.0%	\$0.00	\$576,424.00	100.0%	\$0.00
2002	\$125,400.00	\$225,400.00	\$225,400.00	179.7%	\$0.00	\$225,400.00	100.0%	\$0.00	\$225,400.00	100.0%	\$0.00
2003	\$148,220.10	\$265,357.00	\$265,357.00	179.0%	\$0.00	\$265,357.00	100.0%	\$0.00	\$265,357.00	100.0%	\$0.00
2004	\$148,010.55	\$506,421.00	\$506,421.00	342.1%	\$0.00	\$506,421.00	100.0%	\$0.00	\$506,421.00	100.0%	\$0.00
2005	\$142,683.00	\$749,739.45	\$749,739.45	525.4%	\$0.00	\$749,739.45	100.0%	\$0.00	\$749,739.45	100.0%	\$0.00
2006	\$135,019.50	\$183,218.54	\$183,218.54	135.6%	\$0.00	\$183,218.54	100.0%	\$0.00	\$183,218.54	100.0%	\$0.00
2007	\$134,304.00	\$310,035.96	\$310,035.96	230.8%	\$0.00	\$310,035.96	100.0%	\$0.00	\$310,035.96	100.0%	\$0.00
2008	\$129,808.35	\$345,422.61	\$345,422.61	266.1%	\$0.00	\$345,422.61	100.0%	\$0.00	\$345,422.61	100.0%	\$0.00
2009	\$265,655.64	\$643,781.25	\$643,781.25	242.3%	\$0.00	\$643,781.25	100.0%	\$0.00	\$643,781.25	100.0%	\$0.00
2010	\$144,264.15	\$358,873.27	\$358,873.27	248.7%	\$0.00	\$358,873.27	100.0%	\$0.00	\$358,873.27	100.0%	\$0.00
2011	\$127,561.95	\$127,561.95	\$127,561.95	100.0%	\$0.00	\$114,164.95	89.4%	\$13,397.00	\$43,664.95	34.2%	\$83,897.00
2012	\$72,126.00	\$72,126.00	\$0.00	0.0%	\$72,126.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
<b>Total</b>	<b>\$2,649,453.24</b>	<b>\$6,435,316.42</b>	<b>\$6,363,190.42</b>	<b>240.1%</b>	<b>\$72,126.00</b>	<b>\$6,349,793.42</b>	<b>99.7%</b>	<b>\$13,397.00</b>	<b>\$6,279,293.42</b>	<b>98.6%</b>	<b>\$83,897.00</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**CHDO Loans (CL)**

Fiscal Year	Amount Authorized	Amount Reserved	Amount Committed	% Auth Cmtd	Balance to Commit	Total Disbursed	% Disb	Balance to Disburse
1992	\$23,354.32	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1993	\$36,922.80	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1994	\$9,135.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1995	\$9,885.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1996	\$10,090.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1997	\$9,835.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1998	\$10,530.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1999	\$38,106.93	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2000	\$59,236.49	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2001	\$57,642.40	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2002	\$22,540.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2003	\$26,535.70	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2004	\$50,642.10	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2005	\$74,973.95	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2006	\$18,321.85	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2007	\$31,003.60	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2008	\$34,542.26	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2009	\$64,378.13	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2010	\$35,887.33	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2011	\$12,756.20	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2012	\$7,212.60	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
<b>Total</b>	<b>\$643,531.64</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**CHDO Capacity (CC)**

<b>Fiscal Year</b>	<b>Authorized Amount</b>	<b>Amount Reserved</b>	<b>Amount Committed</b>	<b>% Auth Cmtd</b>	<b>Balance to Commit</b>	<b>Total Disbursed</b>	<b>% Disb</b>	<b>Balance to Disburse</b>
1992	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1993	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1994	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1995	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1996	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1997	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1998	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1999	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2000	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2001	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2002	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2003	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2004	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2005	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2006	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2007	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2008	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2009	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2010	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2011	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2012	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Reservations to State Recipients and Sub-recipients (SU)**

<b>Fiscal Year</b>	<b>Amount Reserved to Other Entities</b>	<b>Amount Committed</b>	<b>% Rsvd Cmtd</b>	<b>Balance to Commit</b>	<b>Total Disbursed</b>	<b>% Disb</b>	<b>Available to Disburse</b>
1992	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1993	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1994	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1995	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1996	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1997	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1998	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
1999	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2000	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2001	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2002	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2003	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2004	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2005	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2006	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2007	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2008	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2009	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2010	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2011	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
2012	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>



U.S. Department of Housing and Urban Development  
 Office of Community Planning and Development  
 Integrated Disbursement and Information System

DATE: 07-01-13  
 TIME: 9:50  
 PAGE: 11

**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Total Program Funds**

(A) Fiscal Year	(B) Total Authorization	(C) Program Income Amount	(D) Committed Amount	(E) Net Disbursed for Activities	(F) Net Disbursed for Admin/OP	(G) Net Disbursed	(H) Disbursed Pending Approval	(I) Total Disbursed	(J) Available to Disburse
1992	\$924,000.00	\$0.00	\$785,400.00	\$785,400.00	\$138,600.00	\$924,000.00	\$0.00	\$924,000.00	\$0.00
1993	\$612,000.00	\$0.00	\$520,200.00	\$520,200.00	\$91,800.00	\$612,000.00	\$0.00	\$612,000.00	\$0.00
1994	\$609,000.00	\$0.00	\$517,650.00	\$517,650.00	\$91,350.00	\$609,000.00	\$0.00	\$609,000.00	\$0.00
1995	\$659,000.00	\$0.00	\$560,150.00	\$560,150.00	\$98,850.00	\$659,000.00	\$0.00	\$659,000.00	\$0.00
1996	\$668,000.00	\$0.00	\$567,800.00	\$567,800.00	\$100,200.00	\$668,000.00	\$0.00	\$668,000.00	\$0.00
1997	\$651,000.00	\$0.00	\$553,350.00	\$553,350.00	\$97,650.00	\$651,000.00	\$0.00	\$651,000.00	\$0.00
1998	\$702,000.00	\$75,300.00	\$672,000.00	\$672,000.00	\$105,300.00	\$777,300.00	\$0.00	\$777,300.00	\$0.00
1999	\$753,000.00	\$613,001.00	\$1,253,051.00	\$1,253,051.00	\$112,950.00	\$1,366,001.00	\$0.00	\$1,366,001.00	\$0.00
2000	\$757,000.00	\$118,650.00	\$762,100.00	\$762,100.00	\$113,550.00	\$875,650.00	\$0.00	\$875,650.00	\$0.00
2001	\$841,000.00	\$244,460.00	\$959,310.00	\$959,310.00	\$126,150.00	\$1,085,460.00	\$0.00	\$1,085,460.00	\$0.00
2002	\$836,000.00	\$93,165.00	\$803,765.00	\$803,765.00	\$125,400.00	\$929,165.00	\$0.00	\$929,165.00	\$0.00
2003	\$988,134.00	\$341,731.00	\$1,181,644.90	\$1,181,644.90	\$148,220.10	\$1,329,865.00	\$0.00	\$1,329,865.00	\$0.00
2004	\$986,737.00	\$135,275.00	\$974,001.45	\$974,001.45	\$148,010.55	\$1,122,012.00	\$0.00	\$1,122,012.00	\$0.00
2005	\$951,220.00	\$163,606.24	\$972,143.24	\$972,143.24	\$142,683.00	\$1,114,826.24	\$0.00	\$1,114,826.24	\$0.00
2006	\$900,130.00	\$107,389.03	\$872,499.53	\$872,499.53	\$135,019.50	\$1,007,519.03	\$0.00	\$1,007,519.03	\$0.00
2007	\$895,360.00	\$96,253.43	\$857,309.43	\$857,309.43	\$134,304.00	\$991,613.43	\$0.00	\$991,613.43	\$0.00
2008	\$865,389.00	\$97,937.21	\$833,517.86	\$833,517.86	\$129,808.35	\$963,326.21	\$0.00	\$963,326.21	\$0.00
2009	\$967,305.00	\$111,275.64	\$933,484.89	\$933,484.89	\$145,095.75	\$1,078,580.64	\$0.00	\$1,078,580.64	\$0.00
2010	\$961,761.00	\$63,121.85	\$690,147.42	\$525,588.06	\$144,264.15	\$669,852.21	\$18,794.13	\$688,646.34	\$336,236.51
2011	\$850,413.00	\$74,478.00	\$188,642.95	\$118,142.95	\$127,561.95	\$245,704.90	\$0.00	\$245,704.90	\$679,186.10
2012	\$480,840.00	\$45,674.49	\$44,764.92	\$36,225.00	\$43,716.25	\$79,941.25	\$9,674.27	\$89,615.52	\$436,898.97
<b>Total</b>	<b>\$16,859,289.00</b>	<b>\$2,381,317.89</b>	<b>\$15,502,932.59</b>	<b>\$15,259,333.31</b>	<b>\$2,500,483.60</b>	<b>\$17,759,816.91</b>	<b>\$28,468.40</b>	<b>\$17,788,285.31</b>	<b>\$1,452,321.58</b>



**Status of HOME Grants  
 SOMERVILLE**

IDIS - PR27

**Total Program Percent**

(A) Fiscal Year	(B) Total Authorization	(C) Program Income Amount	(D) % Committed for Activities	(E) % Disb for Activities	(F) % Disb for Admin/OP	(G) % Net Disbursed	(H) % Disbursed Pending Approval	(I) % Total Disbursed	(J) % Available to Disburse
1992	\$924,000.00	\$0.00	85.0%	85.0%	15.0%	100.0%	0.0%	100.0%	0.0%
1993	\$612,000.00	\$0.00	85.0%	85.0%	15.0%	100.0%	0.0%	100.0%	0.0%
1994	\$609,000.00	\$0.00	85.0%	85.0%	15.0%	100.0%	0.0%	100.0%	0.0%
1995	\$659,000.00	\$0.00	85.0%	85.0%	15.0%	100.0%	0.0%	100.0%	0.0%
1996	\$668,000.00	\$0.00	85.0%	85.0%	15.0%	100.0%	0.0%	100.0%	0.0%
1997	\$651,000.00	\$0.00	85.0%	85.0%	15.0%	100.0%	0.0%	100.0%	0.0%
1998	\$702,000.00	\$75,300.00	95.7%	86.4%	13.5%	100.0%	0.0%	100.0%	0.0%
1999	\$753,000.00	\$613,001.00	166.4%	91.7%	8.2%	100.0%	0.0%	100.0%	0.0%
2000	\$757,000.00	\$118,650.00	100.6%	87.0%	12.9%	100.0%	0.0%	100.0%	0.0%
2001	\$841,000.00	\$244,460.00	114.0%	88.3%	11.6%	100.0%	0.0%	100.0%	0.0%
2002	\$836,000.00	\$93,165.00	96.1%	86.5%	13.4%	100.0%	0.0%	100.0%	0.0%
2003	\$988,134.00	\$341,731.00	119.5%	88.8%	11.1%	100.0%	0.0%	100.0%	0.0%
2004	\$986,737.00	\$135,275.00	98.7%	86.8%	13.1%	100.0%	0.0%	100.0%	0.0%
2005	\$951,220.00	\$163,606.24	102.1%	87.2%	12.7%	100.0%	0.0%	100.0%	0.0%
2006	\$900,130.00	\$107,389.03	96.9%	86.5%	13.4%	100.0%	0.0%	100.0%	0.0%
2007	\$895,360.00	\$96,253.43	95.7%	86.4%	13.5%	100.0%	0.0%	100.0%	0.0%
2008	\$865,389.00	\$97,937.21	96.3%	86.5%	13.4%	100.0%	0.0%	100.0%	0.0%
2009	\$967,305.00	\$111,275.64	96.5%	86.5%	13.4%	100.0%	0.0%	100.0%	0.0%
2010	\$961,761.00	\$63,121.85	71.7%	51.2%	14.0%	65.3%	1.8%	67.1%	32.8%
2011	\$850,413.00	\$74,478.00	22.1%	12.7%	13.7%	26.5%	0.0%	26.5%	73.4%
2012	\$480,840.00	\$45,674.49	9.3%	6.8%	8.3%	15.1%	1.8%	17.0%	82.9%
<b>Total</b>	<b>\$16,859,289.00</b>	<b>\$2,381,317.89</b>	<b>91.9%</b>	<b>79.3%</b>	<b>12.9%</b>	<b>92.3%</b>	<b>0.1%</b>	<b>92.4%</b>	<b>7.5%</b>

# Annual Performance Report HOME Program

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

OMB Approval No. 2506-0171  
(exp. 8/31/2009)

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

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

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

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

## Part I Participant Identification

1. Participant Number	2. Participant Name		
3. Name of Person completing this report		4. Phone Number (Include Area Code)	
5. Address	6. City	7. State	8. Zip Code

## Part II Program Income

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

1. Balance on hand at Beginning of Reporting Period	2. Amount received during Reporting Period	3. Total amount expended during Reporting Period	4. Amount expended for Tenant-Based Rental Assistance	5. Balance on hand at end of Reporting Period (1 + 2 - 3) = 5
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## Part III Minority Business Enterprises (MBE) and Women Business Enterprises (WBE)

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

	a. Total	Minority Business Enterprises (MBE)			f. White Non-Hispanic
		b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	
<b>A. Contracts</b>					
1. Number					
2. Dollar Amount					
<b>B. Sub-Contracts</b>					
1. Number					
2. Dollar Amount					
	a. Total	b. Women Business Enterprises (WBE)	c. Male		
<b>C. Contracts</b>					
1. Number					
2. Dollar Amount					
<b>D. Sub-Contracts</b>					
1. Number					
2. Dollar Amounts					

**Part IV Minority Owners of Rental Property**

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

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

**Part V Relocation and Real Property Acquisition**

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

	a. Number	b. Cost	Minority Business Enterprises (MBE)			f. White Non-Hispanic
Households Displaced	a. Total	b. Alaskan Native or American Indian	c. Asian or Pacific Islander	d. Black Non-Hispanic	e. Hispanic	
1. Parcels Acquired						
2. Businesses Displaced						
3. Nonprofit Organizations Displaced						
4. Households Temporarily Relocated, not Displaced						
5. Households Displaced - Number						
6. Households Displaced - Cost						





Public reporting burden for this collection of information is estimated to average 45 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

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

## Instructions for the HOME Match Report

### Applicability:

The HOME Match Report is part of the HOME APR and must be filled out by every participating jurisdiction that incurred a match liability. Match liability occurs when FY 1993 funds (or subsequent year funds) are drawn down from the U.S. Treasury for HOME projects. A Participating Jurisdiction (PJ) may start counting match contributions as of the beginning of Federal Fiscal Year 1993 (October 1, 1992). A jurisdiction not required to submit this report, either because it did not incur any match or because it had a full match reduction, may submit a HOME Match Report if it wishes. The match would count as excess match that is carried over to subsequent years. The match reported on this form must have been contributed during the reporting period (between October 1 and September 30).

### Timing:

This form is to be submitted as part of the HOME APR on or before December 31. The original is sent to the HUD Field Office. One copy is sent to the

Office of Affordable Housing Programs, CGHF  
Room 7176, HUD, 451 7th Street, S.W.  
Washington, D.C. 20410.

The participating jurisdiction also keeps a copy.

### Instructions for Part II:

1. **Excess match from prior Federal fiscal year:** Excess match carried over from prior Federal fiscal year.
2. **Match contributed during current Federal fiscal year:** The total amount of match contributions for all projects listed under Part III in column 9 for the Federal fiscal year.

3. **Total match available for current Federal fiscal year:** The sum of excess match carried over from the prior Federal fiscal year (Part II, line 1) and the total match contribution for the current Federal fiscal year (Part II, line 2). This sum is the total match available for the Federal fiscal year.

4. **Match liability for current Federal fiscal year:** The amount of match liability is available from HUD and is provided periodically to PJs. The match must be provided in the current year. The amount of match that must be provided is based on the amount of HOME funds drawn from the U.S. Treasury for HOME projects. The amount of match required equals 25% of the amount drawn down for HOME projects during the Federal fiscal year. Excess match may be carried over and used to meet match liability for subsequent years (see Part II line 5). Funds drawn down for administrative costs, CHDO operating expenses, and CHDO capacity building do not have to be matched. Funds drawn down for CHDO seed money and/or technical assistance loans do not have to be matched if the project does not go forward. A jurisdiction is allowed to get a partial reduction (50%) of match if it meets one of two statutory distress criteria, indicating "fiscal distress," or else a full reduction (100%) of match if it meets both criteria, indicating "severe fiscal distress." The two criteria are poverty rate (must be equal to or greater than 125% of the average national family poverty rate to qualify for a reduction) and per capita income (must be less than 75% of the national average per capita income to qualify for a reduction). In addition, a jurisdiction can get a full reduction if it is declared a disaster area under the Robert T. Stafford Disaster Relief and Emergency Act.

5. **Excess match carried over to next Federal fiscal year:** The total match available for the current Federal fiscal year (Part II, line 3) minus the match liability for the current Federal fiscal year (Part II, line 4). Excess match may be carried over and applied to future HOME project match liability.

### Instructions for Part III:

1. **Project No. or Other ID:** "Project number" is assigned by the C/MI System when the PJ makes a project setup call. These projects involve at least some Treasury funds. If the HOME project does not involve Treasury funds, it must be identified with "other ID" as follows: the fiscal year (last two digits only), followed by a number (starting from "01" for the first non-Treasury-funded project of the fiscal year), and then at least one of the following abbreviations: "SF" for project using shortfall funds, "PI" for projects using program income, and "NON" for non-HOME-assisted affordable housing. Example: 93.01.SF, 93.02.PI, 93.03.NON, etc.

Shortfall funds are non-HOME funds used to make up the difference between the participation threshold and the amount of HOME funds allocated to the PJ; the participation threshold requirement applies only in the PJ's first year of eligibility. [§92.102]

Program income (also called "repayment income") is any return on the investment of HOME funds. This income must be deposited in the jurisdiction's HOME account to be used for HOME projects. [§92.503(b)]

Non-HOME-assisted affordable housing is investment in housing not assisted by HOME funds that would qualify as “affordable housing” under the HOME Program definitions. “NON” funds must be contributed to a specific project; it is not sufficient to make a contribution to an entity engaged in developing affordable housing. [§92.219(b)]

2. **Date of Contribution:** Enter the date of contribution. Multiple entries may be made on a single line as long as the contributions were made during the current fiscal year. In such cases, if the contributions were made at different dates during the year, enter the date of the last contribution.
3. **Cash:** Cash contributions from non-Federal resources. This means the funds are contributed permanently to the HOME Program regardless of the form of investment the jurisdiction provides to a project. Therefore all repayment, interest, or other return on investment of the contribution must be deposited in the PJ’s HOME account to be used for HOME projects. The PJ, non-Federal public entities (State/local governments), private entities, and individuals can make contributions. The grant equivalent of a below-market interest rate loan to the project is eligible when the loan is not repayable to the PJ’s HOME account. [§92.220(a)(1)] In addition, a cash contribution can count as match if it is used for eligible costs defined under §92.206 (except administrative costs and CHDO operating expenses) or under §92.209, or for the following non-eligible costs: the value of non-Federal funds used to remove and relocate ECHO units to accommodate eligible tenants, a project reserve account for replacements, a project reserve account for unanticipated increases in operating costs, operating subsidies, or costs relating to the portion of a mixed-income or mixed-use project not related to the affordable housing units. [§92.219(c)]
4. **Foregone Taxes, Fees, Charges:** Taxes, fees, and charges that are normally and customarily charged but have been waived, foregone, or deferred in a manner that achieves affordability of the HOME-assisted housing. This includes State tax credits for low-income housing development. The amount of real estate taxes may be based on the

post-improvement property value. For those taxes, fees, or charges given for future years, the value is the present discounted cash value. [§92.220(a)(2)]

5. **Appraised Land/Real Property:** The appraised value, before the HOME assistance is provided and minus any debt burden, lien, or other encumbrance, of land or other real property, not acquired with Federal resources. The appraisal must be made by an independent, certified appraiser. [§92.220(a)(3)]
6. **Required Infrastructure:** The cost of investment, not made with Federal resources, in on-site and off-site infrastructure directly required for HOME-assisted affordable housing. The infrastructure must have been completed no earlier than 12 months before HOME funds were committed. [§92.220(a)(4)]
7. **Site preparation, Construction materials, Donated labor:** The reasonable value of any site-preparation and construction materials, not acquired with Federal resources, and any donated or voluntary labor (see §92.354(b)) in connection with the site-preparation for, or construction or rehabilitation of, affordable housing. The value of site-preparation and construction materials is determined in accordance with the PJ’s cost estimate procedures. The value of donated or voluntary labor is determined by a single rate (“labor rate”) to be published annually in the Notice Of Funding Availability (NOFA) for the HOME Program. [§92.220(6)]
8. **Bond Financing:** Multifamily and single-family project bond financing must be validly issued by a State or local government (or an agency, instrumentality, or political subdivision thereof). 50% of a loan from bond proceeds made to a multifamily affordable housing project owner can count as match. 25% of a loan from bond proceeds made to a single-family affordable housing project owner can count as match. Loans from all bond proceeds, including excess bond match from prior years, may not exceed 25% of a PJ’s total annual match contribution. [§92.220(a)(5)] The amount in excess of the 25% cap for bonds may carry over, and the excess will count as part of the statutory limit of up to 25% per year. Requirements regarding

bond financing as an eligible source of match will be available upon publication of the implementing regulation early in FY 1994.

9. **Total Match:** Total of items 3 through 8. This is the total match contribution for each project identified in item 1.

**Ineligible forms of match include:**

1. Contributions made with or derived from Federal resources e.g. CDBG funds [§92.220(b)(1)]
2. Interest rate subsidy attributable to the Federal tax-exemption on financing or the value attributable to Federal tax credits [§92.220(b)(2)]
3. Contributions from builders, contractors or investors, including owner equity, involved with HOME-assisted projects. [§92.220(b)(3)]
4. Sweat equity [§92.220(b)(4)]
5. Contributions from applicants/recipients of HOME assistance [§92.220(b)(5)]
6. Fees/charges that are associated with the HOME Program only, rather than normally and customarily charged on all transactions or projects [§92.220(a)(2)]
7. Administrative costs



**Part II: Contracts Awarded**

1. Construction Contracts:

A. Total dollar amount of all contracts awarded on the project	\$
B. Total dollar amount of contracts awarded to Section 3 businesses	\$
C. Percentage of the total dollar amount that was awarded to Section 3 businesses	%
D. Total number of Section 3 businesses receiving contracts	

2. Non-Construction Contracts:

A. Total dollar amount all non-construction contracts awarded on the project/activity	\$
B. Total dollar amount of non-construction contracts awarded to Section 3 businesses	\$
C. Percentage of the total dollar amount that was awarded to Section 3 businesses	%
D. Total number of Section 3 businesses receiving non-construction contracts	

**Part III: Summary**

Indicate the efforts made to direct the employment and other economic opportunities generated by HUD financial assistance for housing and community development programs, to the greatest extent feasible, toward low- and very low-income persons, particularly those who are recipients of government assistance for housing. (Check all that apply.)

- Attempted to recruit low-income residents through: local advertising media, signs prominently displayed at the project site, contracts with the community organizations and public or private agencies operating within the metropolitan area (or nonmetropolitan county) in which the Section 3 covered program or project is located, or similar methods.
- Participated in a HUD program or other program which promotes the training or employment of Section 3 residents.
- Participated in a HUD program or other program which promotes the award of contracts to business concerns which meet the definition of Section 3 business concerns.
- Coordinated with Youthbuild Programs administered in the metropolitan area in which the Section 3 covered project is located.
- Other; describe below.

Public reporting for this collection of information is estimated to average 2 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB number.

Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u, mandates that the Department ensures that employment and other economic opportunities generated by its housing and community development assistance programs are directed toward low- and very-low income persons, particularly those who are recipients of government assistance housing. The regulations are found at 24 CFR Part 135. The information will be used by the Department to monitor program recipients' compliance with Section 3, to assess the results of the Department's efforts to meet the statutory objectives of Section 3, to prepare reports to Congress, and by recipients as self-monitoring tool. The data is entered into a database and will be analyzed and distributed. The collection of information involves recipients receiving Federal financial assistance for housing and community development programs covered by Section 3. The information will be collected annually to assist HUD in meeting its reporting requirements under Section 808(e)(6) of the Fair Housing Act and Section 916 of the HCDA of 1992. An assurance of confidentiality is not applicable to this form. The Privacy Act of 1974 and OMB Circular A-108 are not applicable. The reporting requirements do not contain sensitive questions. Data is cumulative; personal identifying information is not included.

Form HUD-60002, **Section 3 Summary Report, Economic Opportunities for Low- and Very Low-Income Persons.**

**Instructions:** This form is to be used to report annual accomplishments regarding employment and other economic opportunities provided to low- and very low-income persons under Section 3 of the Housing and Urban Development Act of 1968. The Section 3 regulations apply to any **public and Indian housing programs** that receive: (1) development assistance pursuant to Section 5 of the U.S. Housing Act of 1937; (2) operating assistance pursuant to Section 9 of the U.S. Housing Act of 1937; or (3) modernization grants pursuant to Section 14 of the U.S. Housing Act of 1937 and to **recipients of housing and community development assistance in excess of \$200,000** expended for: (1) housing rehabilitation (including reduction and abatement of lead-based paint hazards); (2) housing construction; or (3) other public construction projects; and to **contracts and subcontracts in excess of \$100,000** awarded in connection with the Section-3-covered activity.

Form HUD-60002 has three parts, which are to be completed for all programs covered by Section 3. Part I relates to **employment and training**. The recipient has the option to determine numerical employment/training goals either on the basis of the number of hours worked by new hires (columns B, D, E and F). Part II of the form relates to **contracting**, and Part III summarizes recipients' **efforts** to comply with Section 3.

Recipients or contractors subject to Section 3 requirements must maintain appropriate documentation to establish that HUD financial assistance for housing and community development programs were directed toward low- and very low-income persons.\* A recipient of Section 3 covered assistance shall submit one copy of this report to HUD Headquarters, Office of Fair Housing and Equal Opportunity. Where the program providing assistance requires an annual performance report, this Section 3 report is to be submitted at the same time the program performance report is submitted. Where an annual performance report is not required, this Section 3 report is to be submitted by January 10 and, if the project ends before December 31, within 10 days of project completion. **Only Prime Recipients are required to report to HUD. The report must include accomplishments of all recipients and their Section 3 covered contractors and subcontractors.**

- HUD Field Office: Enter the Field Office name .
1. Recipient: Enter the name and address of the recipient submitting this report.
  2. Federal Identification: Enter the number that appears on the award form (with dashes). The award may be a grant, cooperative agreement or contract.
  3. Dollar Amount of Award: Enter the dollar amount, rounded to the nearest dollar, received by the recipient.
  - 4 & 5. Contact Person/Phone: Enter the name and telephone number of the person with knowledge of the award and the recipient's implementation of Section 3.
  6. Reporting Period: Indicate the time period (months and year) this report covers.
  7. Date Report Submitted: Enter the appropriate date.

8. Program Code: Enter the appropriate program code as listed at the bottom of the page.
9. Program Name: Enter the name of HUD Program corresponding with the "Program Code" in number 8.

**Part I: Employment and Training Opportunities**

**Column A:** Contains various job categories. Professionals are defined as people who have special knowledge of an occupation (i.e. supervisors, architects, surveyors, planners, and computer programmers). For construction positions, list each trade and provide data in columns B through F for each trade where persons were employed. The category of "Other" includes occupations such as service workers.

**Column B: (Mandatory Field)** Enter the number of new hires for each category of workers identified in **Column A** in connection with this award. New hire refers to a person who is not on the contractor's or recipient's payroll for employment at the time of selection for the Section 3 covered award or at the time of receipt of Section 3 covered assistance.

**Column C: (Mandatory Field)** Enter the number of Section 3 new hires for each category of workers identified in **Column A** in connection with this award. Section 3 new hire refers to a Section 3 resident who is not on the contractor's or recipient's payroll for employment at the time of selection for the Section 3 covered award or at the time of receipt of Section 3 covered assistance.

**Column D:** Enter the percentage of all the staff hours of new hires (Section 3 residents) in connection with this award.

**Column E:** Enter the percentage of the total staff hours worked for Section 3 employees and trainees (including new hires) connected with this award. Include staff hours for part-time and full-time positions.

**Column F: (Mandatory Field)** Enter the number of Section 3 residents that were trained in connection with this award.

**Part II: Contract Opportunities**

**Block 1: Construction Contracts**

**Item A:** Enter the total dollar amount of all contracts awarded on the project/program.

**Item B:** Enter the total dollar amount of contracts connected with this project/program that were awarded to Section 3 businesses.

**Item C:** Enter the percentage of the total dollar amount of contracts connected with this project/program awarded to Section 3 businesses.

**Item D:** Enter the number of Section 3 businesses receiving awards.

**Block 2: Non-Construction Contracts**

**Item A:** Enter the total dollar amount of all contracts awarded on the project/program.

**Item B:** Enter the total dollar amount of contracts connected with this project awarded to Section 3 businesses.

**Item C:** Enter the percentage of the total dollar amount of contracts connected with this project/program awarded to Section 3 businesses.

**Item D:** Enter the number of Section 3 businesses receiving awards.

**Part III: Summary of Efforts – Self -explanatory**

Submit one (1) copy of this report to the HUD Headquarters Office of Fair Housing and Equal Opportunity, at the same time the performance report is submitted to the program office. The Section 3 report is submitted by January 10. Include only contracts executed during the period specified in item 8. PHAs/IHAs are to report all contracts/subcontracts.

\* The terms "low-income persons" and very low-income persons" have the same meanings given the terms in section 3 (b) (2) of the United States Housing Act of 1937. **Low-income persons** mean families (including single persons) whose incomes do not exceed 80 percent of the median income for the area, as determined by the Secretary, with adjustments for smaller and larger families, except that

The Secretary may establish income ceilings higher or lower than 80 percent of the median for the area on the basis of the Secretary's findings such that variations are necessary because of prevailing levels of construction costs or unusually high- or low-income families. **Very low-income persons** mean low-income families (including single persons) whose incomes do not exceed 50 percent of the median family income area, as determined by the Secretary with adjustments or smaller and larger families, except that the Secretary may establish income ceilings higher or lower than 50 percent of the median for the area on the basis of the Secretary's findings that such variations are necessary because of unusually high or low family incomes.