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Fourth Program Year DRAFT CAPER

The CPMP Fourth Consolidated Annual Performance and Evaluation Report includes Narrative Responses to CAPER questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations. The Executive Summary narratives are optional.

The grantee must submit an updated Financial Summary Report (PR26).

GENERAL

Executive Summary

Program Year 4 CAPER Executive Summary response:

The Year 4 Action Plan provided the basis and strategy for the use of federal funds granted to the City of Medford by the U.S. Department of Housing and Urban Development (HUD) under the Community Development Block Grant (CDBG) program. The plan identified proposed objectives and outcomes for the fourth program year of the Five Year Consolidated Plan, for the period of July 1, 2013 through June 30, 2014. While local cities were planning for significant cutbacks, the City of Medford received \$1,476,311.00 in CDBG funds, an increase of \$64,056.00 from the prior year. This CAPER will provide an assessment of the City's progress on meeting those goals and objectives along with describing the use and distribution of funds.

The primary objective of the program is to develop viable communities and meet the needs of low and moderate income residents. Through a broad range of activities a suitable living environment, decent, safe, and sanitary housing and economic opportunities are provided.

The City of Medford, under the leadership of the Mayor, administers Community Development Block Grant funds through the Office of Community Development. In the applicable planning processes, the City identified a number of needs and prepared a plan that best suited addressing those needs within the limits of available resources. Efforts in the fourth program year were focused on public service delivery, planning and coordination with nonprofit and private partners to create housing, planning and implementation of accessibility improvements and historic preservation planning, economic development and public facilities improvements.

Public service programs provided a range of services for Medford residents including legal aid, referral and counseling services, services for the elderly, elementary after-school care, as well as vocational, social, recreational and

educational opportunities for developmentally disabled residents and their families.

CDBG funding was expended on several street reconstruction projects. In Year 4, work continued on Alexander Avenue, Trout Avenue and Elliot Streets in South Medford. Completion of the projects is expected in fall, 2014.

The City continues its commitment to increase affordable housing opportunities. Medford Community Housing, a non-profit Community Development Organization, and the Boston Avenue Housing Corporation, an offset of the West Medford Baptist Church, completed the conversion of an existing parsonage into two affordable units during Fall of 2013. Both units were occupied in early 2014. Financing through NSC HOME funds, the City of Medford Community Development Block Grant, and a private commitment from a local bank made the project possible. Medford Community Housing continues to look for additional redevelopment opportunities to create affordable housing restricted for households at 60% or less of the area median income (AMI).

Removal of Architectural Barriers by making the second floor of the historic Shepherd Brooks Estate Manor is being accomplished by the installation of an elevator and related work. Due to the complexity of installing an elevator in a historic structure, implementation took longer than expected. \$110,635.87 was expended during Program Year 39. The elevator is expected to be operational and the project complete in fall, 2014.

Improvements at Hickey and Morrison Parks, and Phase 3 improvements at Columbus Park are in the process of being closed out, with \$671,152.20 expended this past year. Morrison and Hickey improvements focused on creating accessibility to these important public facilities by the removal of architectural barriers, including the installation of curb ramps, accessible pathways where existing ones did not meet current accessibility standards due to cross slopes, width or condition, installation of handicap parking spaces adjacent to each park and related access to facilities within the parks, accessible crosswalks and removal of inaccessible benches, etc. Columbus Park improvements benefit a low and moderate income area. The third and final stage of improvements at Columbus included the installation of handicap accessible benches and seating, slope restoration, lighting upgrades and renovation of softball field and facilities.

Removal of architectural barriers at the community school pool and locker room, at Medford High School is nearing completion, with \$408,162.74 expended this program year. The community school pool is anticipated to open for public programming during fall 2014.

The efforts of the office also include all planning and development activities involved with the provision of housing, expansion of businesses and transportation and the preservation and enrichment of open spaces. Major

developments include the continuation of projects at River's Edge and Station Landing, coordination for the inclusion of affordable housing units at Lumiere, River's Edge and Medford Muse, revitalization of Medford Square, the enhancement and the study and scheduling of improvements to the building and grounds of the Medford Senior Center,. Planning efforts have also facilitated neighborhood revitalization through the use of state and city funds for the reconstruction of McNally Park and the planned reconstruction of Magoun Park using a State grant leveraged with CDBG funds. Construction of both parks will be substantially completed in fall, 2014.

The City negotiated the inclusion of affordable housing units at various privately-funded projects. Sixteen units will be created at Criterion Development's 163-unit project, Lumiere, at 3780 Mystic Valley Parkway. Marketing is underway, with the lottery scheduled for December.. The City is also in negotiations to include 10%, approximately 30 affordable units, at Medford Muse. A lottery was also conducted for two units at 61 Boston Avenue. Both units are currently occupied.

Progress continues at River's Edge with the building now 100% leased. River's Edge is joined by businesses Management Sciences for Health (MSH), Marriott, Aetna Student Health, Progenika, Labthink, Preotle, Lane & Associates, and Unidine.

General Questions

Program Year 4 CAPER General Questions response:

1. Assessment of the one-year goals and objectives:
 - a. Describe the accomplishments in attaining the goals and objectives for the reporting period.
 - b. Provide a breakdown of the CPD formula grant funds spent on grant activities for each goal and objective.
 - c. If applicable, explain why progress was not made towards meeting the goals and objectives.

The Community Development Block Grant Program is administered by the City of Medford Office of Community Development (OCD). The City also receives HOME funds through membership with the North Suburban HOME Consortium (NSC). NSC is an affordable housing consortium that serves the communities of Malden, Medford, Arlington, Chelsea, Everett, Revere, Melrose and Winthrop. As member communities, the City, nonprofit agencies, for-profit companies, and individuals, are eligible to submit applications for HOME funds that target federal housing assistance to benefit lower income citizens. Citizen participation meetings are held on a regional basis to receive input on the expenditure of these funds.

The City of Medford received \$1,476,311.00 in federal Community Development Block Grant funds for its thirty-ninth program year (July 1, 2013 to June 30, 2014) as well as \$4,569.55 in Program Income. According to regulations governing the program, activities shall be undertaken so that

at least 70% of the funds benefit the City's low and moderate income citizens. Projects that do not meet the low and moderate income criteria must either aid in the elimination of slums or blighted conditions or meet an unexpected urgent need. While public services that benefit low and moderate income persons are eligible activities, no more than 15% of funds can be used to support public services.

The City expended \$2,833,834.66 in CDBG funds during the reporting period. Additionally, the City accomplished a 99.27% low and moderate income benefit during this period. When combined with the prior two years low and moderate income benefit, the total for the three-year reporting period is 99.50% low and moderate benefit.

HOME Program funds of \$32,500 were expended for downpayment/buydown assistance to two Medford residents during the reporting period. An additional purchase/rehab project was also closed out, with additional expenditures of \$63,860. No HOME Admin or project delivery expended during the program year.

The City's objectives for the use of CDBG funds in 2013-2014 from the annual Action Plan are presented below with an assessment of fulfilling goals and objectives.

HOUSING

24 CFR 570.202(b)/570.208(a)(3) Citywide

The City's housing activities targeted education and organization, increasing the number of Medford residents participating in homebuyer workshops and utilizing HOME downpayment assistance to purchase homes in Medford. The City's activities also targeted the production of new rental and homeownership opportunities. CDBG staff resources were also utilized to increase the production of affordable rental and homeownership units, leveraging private resources.

Medford is committed to supporting preservation, production and access to decent housing for its low and moderate income residents. The Affordable Housing Development Specialist position was created to implement the City's proposed housing activities and convene the affordable housing task force with the intention of increasing community involvement in setting priorities and identifying solutions surrounding affordable housing issues. The City's housing activities supported the creation of new or newly deeded restricted affordable housing and the provision of opportunities for homeownership and affordable rental opportunities in the City.

The following summarizes the City's goals and objectives for housing expenditures, with proposed versus actual accomplishments and provides specific detail on housing related activities.

Objective #1 – Affordable Housing Production, Decent Housing

The City of Medford maintains efforts to support the development of permanently affordable housing for low and moderate income households by requiring affordable units when public and private land is redeveloped and collaborating with private developers and supporting nonprofit housing programs. This can be used as a model by other communities with limited federal resources in a growing residential market.

The City negotiated with Criterion Development Partners to make 10% or 16 units, affordable at their newest development, Lumiere, under Department of Housing and Community Development's (DHCD), Local Action Unit Program. These units will be marketed to households at or below 80% AMI. Rents will be set based on 30% of 80% income limits, minus utility allowances, effectively less than High HOME rents. These units should be occupied by the fall of 2014 and will include a mixture of studios, one- and two- bedroom units. DHCD approved 3 units of affordable rental units at the Hillside school apartments and one homeownership unit at the Mystic Green Condominium on 24-30 High Street in Medford Square. Medford is also in negotiations with the developers of Medford Muse for the inclusion of another 10%, approximately 30, of affordable rental units in their new development.

The City also continues to partner with nonprofit developers to increase affordable housing opportunities. Medford Community Housing Corp., a Community Development Organization, worked together with the Boston Avenue Housing Corporation, to redevelop an existing parsonage, creating 2 restricted affordable rental housing units. Construction was completed in 2013, with both units occupied during early 2014. The project was financed with NSC HOME funds, City of Medford Community Development Block Grant funds, and private financing commitment from a local bank. Additionally, Medford Community Housing looks ahead to other redevelopment opportunities to transform existing properties into affordable restricted housing for households at 60% or less of the area median income (AMI).

Objective #2 – Homeownership, Decent Housing

The City of Medford supported homeownership for low and moderate income households through participation in the North Suburban HOME Consortium's (NSC) First-time Homebuyers program. This program traditionally provides \$7,500.00 - \$8,500.00 in downpayment and closing cost assistance for income-eligible first time homebuyers. Two new low to moderate income households received this assistance during Year 4, while an additional purchase/rehab was closed out.

Medford Community Housing offered seven First-time Homebuyers workshops. Over 98 households participated in these classes held at Medford Housing Authority this program year.

Accomplishments
Community Development Block Grant
Housing Objectives
Year 39

July 1, 2013 – June 30, 2014

Objective #1: Affordable Housing Production, Decent Housing

Create affordable housing units for low and moderate income individuals and families.

Table 1: Affordable Housing Production, Decent Housing

<u>Program/ Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>Nonprofit Affordable Housing Development:</u> Provide financial assistance for developers who want to create affordable rental units for households below 60% median income	14B	\$19,185.00	Proposed: Development of 2 units of permanently affordable rental housing. The City worked with Medford Community Development Corp. to create two units of restricted affordable housing. \$19,185 of CDBG was expended this year. The units were occupied early 2014.
<u>Private Affordable Housing Development</u>		No CDBG funds expended	The City negotiated a set-aside of 16 affordable rental units with Criterion Development within the 163-unit luxury complex, Lumiere.

Objective #2: Homeownership, Decent Housing

Increase and encourage homeownership for moderate-income households.

Table 2: Homeownership, Decent Housing

<u>Program/ Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>Downpayment Assistance:</u> Participate in North Suburban		HOME \$96,360	Proposed: Assist 3 low- to moderate-income households with homeownership

HOME Consortium ADDI-funded downpayment assistance program			assistance. Actual: Assisted 2 new low-to moderate-income households with assistance in purchasing homes, while closing out an additional purchase/rehab.
<u>First-time Homebuyer Workshops:</u> Through Medford Community Housing, offer CHAPA certified first-time homebuyer program.		No CDBG funds expended	Seven first time homebuyers workshops occurred in Medford, run by Medford Community Housing. 98 households participated in the workshops.

PHYSICAL IMPROVEMENTS TO CITY SYSTEMS AND PUBLIC FACILITIES

24 CFR 570.201(c)/570.208(a)(1) & (b)

The City sought to reconstruct its infrastructure, public facilities, water, sewer, drainage, sidewalk, and roadway facilities. Projects to remove Architectural Barriers were also accomplished so as to efficiently provide acceptable public facilities to its citizenry. Expenditures included \$2,313,130.70 of CDBG funds.

Other public facility improvements include the reconstruction of Trout Avenue, Eliot Street and Phase 2 of Alexander Avenue. The project commenced during fall of 2013 is currently underway with substantial completion planned for fall, 2014. A total of \$1,113,335.12 was spent in the last program year.

Removal of Architectural Barriers by the addition of a handicapped accessible lift at the historic Shepherd Brooks Estate Manor nears completion and is expected to close out in fall of 2014. A total of \$110,635.87 was expended this program year.

Removal of architectural barriers were completed at Hickey and Morrison Parks. Phase 3 of Columbus Park, encompassing the rehabilitation of the softball field, has been completed. Access Improvements to Edgerly field have also been completed and closed out. Barry Park expenditures were also finalized. A total of \$680,996.97 was expended this year.

Removal of architectural barriers at the community school pool and locker room at Medford High School also nears completion and is anticipated to open during fall of 2014. A total of \$408,162.74 was expended during PY39.

1. The following assesses proposed versus actual accomplishments.

Objective #1 - Suitable Living Environment

Make improvements to public facilities and City systems to provide basic services to citizens, especially in low and moderate income areas.

Table 3: Physical Improvements

<u>Program/ Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>Water, Sewer, Drainage, Street, Sidewalk, Signal Improvements.</u> Upgrade and replace street systems including water, sewer, drainage, lead service connections, sidewalks, traffic signals, trees and landscape improvements.	03K	\$1,113,335.12	Proposed: Improve living conditions in designated low and moderate income neighborhoods. Outcome: Construction of roadway improvements on Alexander, Eliot and Trout Avenues.
Removal of Architectural Barriers by improving access on sidewalks, crosswalks, parks and public buildings.	03L	\$308,604.19 CDBG \$408,162.74	Outcome: Removal of Architectural Barriers to Morrison/Hickey Parks, and Barry Park. Completion of Edgerly Field. Outcome: The community school pool and locker room project at MHS is almost complete and anticipated to open Fall 2014.
Remove Architectural Barriers at the Shepherd Brooks Estate Manor historic property	03	\$110,635.87	Construction of the handicapped accessible lift nears completion and will close-out Fall 2014.
Rehabilitation of Public and Recreational facilities.	03F	\$372,392.78	Completion of Phase II Improvements, including the softball field at Columbus Park.

The City's expenditures were consistent with proposed accomplishments anticipated for the 39th program year.

ECONOMIC DEVELOPMENT

24 CFR 570.201(c)/570.208(b)

The City's goal for the program year is to revitalize areas to create employment and to increase the tax base. The commitment to expand economic opportunities and community well-being continues.

Medford Square

Medford Square is showing signs of increased economic development and vitality. In keeping with the Medford Square Master Plan's objective to encourage smart growth and mixed uses in the downtown area, two new residential developments have been completed and occupied in Medford Square. Existing brick buildings at 16-22 and 24-30 High Street have been redeveloped to create 24 upscale apartments, which have direct access from the street and overlook the Mystic River. These new residences have added life to the Square, in addition to high quality commercial developments such as the new "Best Sellers" book shop and café and "Carrolls" a full service restaurant and bar, which also take advantage of the riverside location. This new energy has resulted in the appearance of ethnic restaurants which add additional life and interest to the downtown.

Building on previous successes in opening up the riverfront and creating Clippership Park, the City has completed plans for the extension of the park and bikeway to culminate on the grounds of the Medford Senior Center. The project will include a central seating area, with accessible pathways to and through the senior center, adjacent senior housing developments and to the existing Clippership Linear Park. This will serve the recreational needs of seniors, but also provide an attractive civic space which will enhance the downtown, serving the needs of residents and employees alike. Plans are currently being reviewed by MassDOT and are expected to go into construction during spring of 2015. The City has used \$163,000.00 in leveraged funds for design and has been very successful in leveraging additional funds for construction. These funds include a \$475,000.00 Section 125 Earmark, a \$100,000.00 grant from the Cummings Foundation, as well as additional private donations totaling over \$50,000.00. The City has also submitted an application for a \$300,000.00 State PARC grant to be used on the project, whose construction cost is estimated at just over \$1,000,000.00.

Furthermore, the City has been working with State officials to use a previously secured grant in the amount of \$707,904.00 to fund a feasibility study and construction of a water taxi dock and service at Clippership Park. When implemented, this project will create a water transportation link between Medford Square and the smart growth development nodes of Station Landing and Assembly Square, which are located down river in Medford and Somerville. This will enhance connectivity and create an additional impetus for further economic growth.

Additionally, the City has designated Medford Square as an EDA (Economically Distressed Area) under Massachusetts Law, in order permit property owners in the area to receive State tax and financial incentives for assessment and remediation of brownfields in an effort to catalyze redevelopment and spur continued economic growth in Medford Square.

River's Edge

River's Edge is a 215-acre public/private development site located five miles north of Boston, at Wellington circle in Medford, Massachusetts, continues to progress and expand. This multi-use, transit-oriented, waterfront development offers easy access to Route 93, to Logan Airport, and direct service to downtown Boston on the MBTA's Orange Line from Wellington Station.

Designed in the spirit of "Smart Growth", guided by the Mystic Valley Development Commission (MVDC) and developed by Preotle Lane and Associate, River's edge is being developed in three phases. This project is now well underway, together with the cities of Everett and Malden. In a prior year, the City obtained a Section 108 loan of \$1,000,000.00 for this project, which is paid by the City of Everett from a BEDI grant.

The City's long-term goal, relative to the project Section 108 loan, is to create 42 jobs in Medford, with 51% (21.5 jobs) made available to low or moderate income individuals. Management Sciences for Health (MSH), a global leader in developing health care systems, moved its headquarters to 200 River's Edge Drive. The building is now 100% leased. MSH joins tenants, Aetna Student Health Services, Physicians Professional Services, Marriot International's Northeast Sales Office, New England Regional Office and Labthink, bringing the total number of jobs created to 450. Thus, the City has well exceeded its goals and met job requirements of its Section 108 agreement with HUD. The 220-units residential development at River's Edge is fully occupied and a second development to include 262 residential units, 2,500 square feet of retail and 7,500 square feet of restaurant space is in the permitting phase.

The MVDC has begun the permitting process for Phase 4 of the Wellington Greenway Project. Phase 4 will provide the missing link of the Wellington Greenway from the Wellington MBTA Station to Route 16.

Station Landing

The City worked with National Development, private developer of the "Station Landing" smart growth mixed-use development, located at Census Tract 3398.01, to permit a new 152 room boutique hotel at 90 Station Landing. Construction will commence on the 83,000 square foot hotel by year's end and will be the last building at Station Landing. AC Hotel by Marriot finalizes the project, joining luxury apartment complexes, Arborpoint

and 75 Station Landing, several restaurants, retail stores, offices and parking garage along the Orange Line at Wellington Circle.

Objective #1 – Suitable Living Environment

Revitalize existing commercial centers by supporting economic development activities.

Table 4: Economic Development

<u>Program/Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>Parking Garage</u> Implement parking management plan and pursue construction of a downtown parking garage		No CDBG funds expended	Promote viable economic development environment, create and retain job.
<u>Open Space Plan</u> Complete 7-year Open Space plan		The City expended \$680,996.97 on barrier removal and park improvements	Outcome: Improvements to and expansion of City’s Open Space and recreation system, including Hickey, Morrison, Barry and Columbus Parks. Leveraged funds for McNally and Magoun Parks. McNally Park in design and bid stages.

Objective #2 - Creating Economic Opportunities

Revitalize existing commercial centers by supporting economic development activities.

Table 5: Economic Development

<u>Program/Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>Micro-Enterprise Program</u> Partner with ACCION, USA to support low to moderate income owned micro-enterprise businesses	18C	None in PY39	Outcome: Provided financial education and/or loans to 9 low/mod micro-enterprises to enable support of business expansion.

<u>Program/Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>River's Edge</u> Redevelop an under-utilized Brownfield site.	17D	Section 108 loan Funding expended in prior years	Proposed: Continue Phases 1 and 2 on revitalization of 30-acre site, obtaining long term, multi-year objectives. Outcome: Significant progress made and objectives achieved on multi-year revitalization project leveraging private funds.

PUBLIC SERVICES

24 CFR 570.201(e)/570.208(a) (2) (i)

Objective #1 – Suitable Living Environment

Improve the quality of life for low and moderate income Medford residents and promote increased self-sufficiency.

The City sought to provide a variety of public service programs by allocating \$221,446.00 for various public services. During the reporting period, \$219,956.90 was expended.

The City’s objectives included: combating social illnesses, including family violence, public safety and substance abuse, which weaken the stability of the City’s households and neighborhoods; improving the quality of life for the community’s elderly population, through a broad range of social, public safety, educational and transportation programs; improving the quality of life for Medford’s school children, through the provision of afterschool child care programs; improving the resources available to the City’s population at risk of homelessness, residents in crisis, local consumers, and the physically and developmentally disabled population; encouraging the creation of affordable housing and assisting those with emergency and transitional housing needs. Programs include legal aid, food pantry and meals, and referral and counseling services, as well as providing vocational, social, recreational and educational opportunities for developmentally disabled Medford residents and their families.

A Better Tomorrow Services provides a variety of programs and a lunch, one day per week, for Haitian Elders. This population is otherwise isolated due to inability to speak English. The program has been very successful with attendance increasing and outreach being very effective. These programs provide meaningful social and recreational activities for Medford seniors. \$3,891.00 of CDBG funds were expended for the Elder Services Director and

an assistant, who direct the current programs that benefited 14 Medford seniors, 100 percent of whom were low to moderate income in this presumed elderly category.

Boys & Girls Clubs operates an afterschool program five days per week, providing educational programs, homework assistance, social activities and self-improvement resources, to meet the needs of underserved and at-risk Medford youth. The Medford Clubhouse staff meets the needs of Medford youth through carefully designed, effectively administered and consistently evaluated programs. \$1,945.00 in CDBG funding was used to provide services to 30 low to moderate income Medford youths, of which 15 were from female-headed households.

Bread of Life provides emergency meals, food pantry, clothing and furniture assistance to homeless and needy families. Thousands of meals and meal equivalents were served this year, with meals being offered every Tuesday through Friday evening. Free clothing is also available during the evening meal, while A food pantry is available weekly. An estimated 361 Medford residents were served, 161 persons benefited from \$1,052 in CDBG funding.

This total includes holiday meals served and meals that are delivered to shut-ins during the Easter/Passover, Thanksgiving and Christmas holidays. Bread of Life also offers counseling, outreach, advocacy and referral services to this population. Bread of Life has expanded their outreach to homeless families displaced to area motels.

The Community Family, Inc. utilizes CDBG funds to provide financial assistance to adult Medford residents with Alzheimer's disease who require dementia-specific adult day services at the Buddy Coholan Memory Loss Center in Medford. The program prevents the unnecessary or premature nursing home placement of adults with memory disorders and improves the quality of life for participants and their families. The multifaceted program consists of nursing care, social work services, a therapeutic activities program, socialization, rehabilitative care, daily nutrition and personal care services. The Medford center program provides critical respite services for primary caregivers. Four severely disabled persons benefited from \$1,752.00 in CDBG funds.

The Medford Consumer Advisory Commission leveraged \$7,004.98 in CDBG funds with \$42,000.00 in funds from the State Attorney General's Office and the City to provide consumer mediation, referral and education services to Medford residents. The Advisory Commission offers advice to consumers and mediation services on landlord/tenant rights, discrimination and labor complaints, contracts, credit related problems and any large or small business transactional disputes. Senior citizens, minorities and low income residents are the highest percentage of the public who are targeted by frauds. The Consumer Advisory program makes concerted outreach efforts to inform less-educated, lower income populations of consumer

protection rights in dealing with fraudulent businesses. Findings are reported to the Attorney General's Office for review and further action if necessary. Throughout the year, the Consumer Advisory Program assisted 324 persons.

The Council on Aging: The following five public service programs were provided by the Council on Aging: 1) Home Maintenance program, 2) Senior Drop-In Center transportation, 3) Nutritional Shoppers transportation services, 4) Exercise program, 5) Senior Volunteer Coordinator. The home maintenance program improves the safety of the home environment, and enhances the quality of living conditions for low income elderly clients by assisting in their ability to live independently in their homes. Recreational day trips to the Senior Center are designed to reduce isolation in the elderly population. The exercise program held at West Medford Community Center provides Medford seniors with the opportunity to participate in physical activities to maintain fitness, however, this program was not well attended so was discontinued. The Seniors Shoppers' Service provides local elders with access to supermarkets for grocery shopping; many clients would otherwise need to pay expensive taxi fares or shop at variety stores that are more expensive. This transportation service greatly improves the quality of life for our seniors. A Volunteer Coordinator was also funded to maximize volunteer assistance to the programs. CDBG funds, of \$60,438.81 were expended to service approximately 1,125 Medford seniors, with 100 percent being low to moderate income in this presumed category of elderly persons.

EMARC (Arc of East Middlesex Association for Retarded Citizens) \$4,669.00 in CDBG funds were leveraged with approximately \$36,000 of fundraising and private grants to provide support services for Medford persons with developmental disabilities and their families. Social and recreational activities such as track and field, special Olympic training and trips, dances for participants aged 13-23, music therapy, and vocational camps were offered this program year. A very successful teen support program was started in Medford at the West Medford Community Center. Arc also provided workshops, support groups, training, information and referrals to their clients and families. Ninety-three low to moderate income persons benefited from CDBG funding.

Immigrant Learning Center expended \$3,891.00 in CDBG funds, assisting non-English speaking persons through a continuum of English As A Second Language classes to various levels of students so they can lead productive lives in the U.S. Beneficiaries included 72 Medford residents, of which 45 were female-head households; 100 percent were low to moderate income in this presumed category of illiterate adults.

Medford Family Life/Heading Home, Inc. expended \$3,891.00 in CDBG funds to assist homeless families with temporary housing and case management services. The services provided include life skills/parenting support and housing search assistance to help them to become self-sufficient by building skills for successful participation in the community. Once the

family moves into independent housing, weekly workshops, referrals for community-based services, and follow-up support are provided. Thirty Medford residents were provided with temporary housing and support services, with 100 percent categorized as extremely low income persons.

Medford Public Schools After-School Childcare serves the need of low to moderate income families requiring quality and affordable afterschool and vacation care. This program also links the school-day curriculum to the afterschool program by providing homework assistance and dedicated homework time for children attending the afterschool program. After-school programs are available at the Brooks, Columbus, McGlynn and Roberts Elementary Schools. \$8,760.00 in CDBG funds assisted 8 Medford families, including 7 female headed households, by providing much needed quality afterschool care for families that otherwise could not afford it.

Mystic Valley Elder Services operates a transportation program for elders over 62 years of age who require travel assistance to critical medical appointments, such as dialysis, chemotherapy, and radiation therapy. It also provides for those who require chair car service to medical appointments and day care. This is an important service for families with no means to transport a wheelchair bound elder. Due to the frequency of the medical treatments, transportation is extremely expensive for individuals to purchase privately and it becomes difficult for family, friends or volunteers to provide all required trips. This year \$8,405.00 in CDBG funds was expended, benefiting 16 Medford residents. One hundred percent were low to moderate income in this presumed elderly category.

The Salvation Army operates the Emergency Services Program, providing emergency financial assistance for rent, utilities, and food and clothing allowances. The social worker provides budget counseling, crisis intervention, referrals and advocacy for Medford residents. The program's goal is the alleviation and management of financial crisis for Medford, Malden, and Everett residents. \$1,167.00 in CDBG funds benefited 11 Medford households, 6 being female-headed.

SCM Community Transportation Inc. provides transportation for Medford's senior and mobility-impaired residents. SCM continued its medical dial-a-ride transportation, as well as its service to the Council on Aging Congregate Meals program. SCM transportation continues to provide needed transportation services to our elderly and disabled populations promoting greater self-sufficiency and independence. SCM expended \$86,395.93 in CDBG funds, providing transportation services to 292 Medford seniors, 100 percent of whom were low to moderate income in the presumed elderly category.

Tri-City Community Action Program, Inc. (Tri-CAP) serves the needs of low income clients of Medford, who cannot afford legal representation, by locating local attorneys in private practice who are willing to provide legal

representation free of charge. Using these 'panel attorneys', individuals who otherwise would not have legal representation, are able to appear in court with a competent advocate representing their legal rights. \$5,604.00 in CDBG funds was expended for the Pro Bono Legal Project (PBLP) that provides a wide range of legal services in the areas of housing, family law, bankruptcy law, consumer law and Social Security Disability. Tri-CAP, working in partnership with Mediation for Results, provides alternative dispute resolution between landlords and tenants in an effort to resolve tenancy problems before they progress into eviction problems. The Pro Bono Legal Project places a particular emphasis on cases that have the potential to have a significant impact on the lives of low income people. For that reason, the PBLP prioritizes cases in which families might become homeless, lose income, or suffer abuse. 188 low to moderate income Medford residents benefited from this activity.

West Medford Community Center provides an increasing number of elderly services programs each year. Attendance at the senior lunch program increased and other activities were held, including a computer class, yoga, knitting, blood pressure clinic, games and cards and various medical presentations. These programs provide meaningful social and recreational activities for Medford seniors. \$21,090.18 of CDBG funds were expended for the Elder Services Director, who oversees current programming that, benefited 326 Medford seniors, 100 percent of whom were low to moderate income in this presumed elderly category.

Accomplishments

Community Development Block Grant
Public Services Programs
Year 39

July 1, 2013 – June 30, 2014

Table 6: Public Services Programs

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<u>A Better Tomorrow Services</u> An Adult Day Program for Haitian seniors, providing social and emotional support.	05A	\$3,891 Funded \$3,891 Expended	Provided 14 Medford Haitian seniors with recreational, educational and social support programs one day per week. All residents were provided with the services they requested.	Increased access to and use of community recreational activities and resources for Haitian elderly. Decreased isolation for these residents.

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<u>Boys & Girls Clubs</u> Afterschool program for at-risk Medford youth. Educational programs and social activities are provided.	05D	\$1,945 Funded \$1,945 Expended	Provided educational assistance and social programs for 30 youths, to meet the needs of underserved and at-risk youth.	Improve quality of life by providing youth with a safe social program. Provide academic support for 30 youth.
<u>Bread of Life</u> Emergency Food Pantry services provided to all needy individuals in the Tri-City Area. Free cooked meals are provided 4 days per week. Holiday food baskets and coupons are distributed to needy families.	05	\$1,052 Funded \$1,052 Expended	Provided nutritious meals and meal equivalents to 161 Medford residents. Provided food baskets and food coupons to local supermarkets for the holidays.	Low income residents in need receive nutritious meals and food pantry supplies. Reduce hunger through counseling, referrals and outreach. Improve the quality of life for low income families and individuals.
<u>Community Family</u> Memory Loss Center provides nursing care, social work services, therapeutic activities, daily nutrition and support for Alzheimer's patients and their families.	050	\$1,752 Funded \$1,752 Expended	Provided 4 individuals and their families with specific care and support services. Goals exceeded.	Provided Alzheimer patients and their families with vital programs and support services. Improved quality of life. Goals exceeded.
<u>Consumer Advisory</u> Advocacy program offers consumers advice and complaint mediation services on landlord/tenant issues, discrimination and labor complaints, credit problems and business transactions.	05C	\$7,004.98 Funded \$7,004.98 Expended	Provided 324 individuals and seniors with consumer advice or mediation services.	Helped to decrease consumer fraud especially with elderly and low income residents. Increased consumer savings in business, credit situations, and landlord/tenant issues.

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<p><u>Council on Aging</u> The Council on Aging provides services to senior citizens: home maintenance program, recreational day trips, nutritional shopping transportation, exercise program and Senior Center volunteer coordinator.</p>	05A	\$60,438.81 Funded \$60,438.81 Expended	Provided approx. 1,125 seniors with safety-related simple home maintenance, nutritional shopping transportation, drop-in center transportation, exercise program and a volunteer coordinator. Goals met.	Improved quality of life and safety for seniors. Provided a suitable living environment in their homes. Reduced feelings of isolation. Enhanced nutrition and overall health, safety and welfare. Increased access and use of community resources for seniors
<p><u>EMARC (Arc of East Middlesex)</u> Recreation and social programs for developmentally disabled Medford residents and their families.</p>	050	\$4,669 Funded \$4,669 Expended	Provided 93 developmentally disabled Medford residents and their families with a variety of recreational, social and therapeutic support programs. All residents were provided with the services they requested.	Increased access to and use of community recreational activities and resources for developmentally disabled residents and their families. Decreased isolation for these residents and their families.
<p><u>Heading Home, Inc./Medford Family Life Education</u> Assists homeless families with temporary housing and case management services.</p>	05	\$3,891 Funded \$3,891 Expended	Provided 30 Medford residents with temporary housing and support services. Goals exceeded.	Continued support services for Medford residents to facilitate successful transition to permanent homes to prevent homelessness. Provided suitable living environment.
<p><u>Immigrant Learning Center</u> A continuum of English As A Second Language classes is made available to all levels of students so they can lead productive lives in the U.S.</p>	05	\$3,891 Funded \$3,891 Expended	72 Medford residents were able to participate in these classes. Goals exceeded.	Improved quality of life for people who do not speak English. Provide accessibility to services.

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<u>Medford Afterschool</u> Provide safe, quality afterschool care program for elementary school children	05L	\$8,760 Funded \$8,760 Expended	8 Medford families were able to participate in these classes. Goals exceeded.	Improved quality of life for youth. Provide accessibility to services.
<u>Mystic Valley Elder Services</u> To provide transportation for critical medical appointments and day care for seriously ill or disabled residents.	05A	\$8,405 Funded \$8,405 Expended	Provided medical transportation and day care rides to 16 Medford residents. Services were provided to all that requested transportation. Goals met.	Provided support for critically ill or disabled seniors, by assisting families to support these seniors. Provide accessibility to services.
<u>Salvation Army Emergency Service Program</u> To provide emergency financial assistance and budget counseling in crisis situations.	05Q	\$1,167 Funded \$1,167 Expended	Provided emergency financial assistance and counseling to 11 extremely low income individuals in need. Goals exceeded.	Increased support and hope for extremely low income families and individuals. Sustained living environment.
<u>SCM Transportation</u> To provide transportation to Medford's senior or mobility-impaired residents.	05A	\$86,395.93 Funded \$86,395.93 Expended	Provided 292 elderly and disabled people with much needed transportation.	Increased accessibility to recreational, social and medical services to sustain good health and prevent isolation and loneliness.
<u>Tri-CAP Pro Bono Legal Project</u> To provide free legal services to low income Medford residents for civil law cases.	05C	\$5,604 Funded \$5,604 Expended	Provided free legal advice and services to 188 low and moderate income individuals and families in civil law cases. Accomplishments exceeded.	Reduction in the number of homeless adults and families. Prevention of involuntary dislocation of low income families and individuals with disabilities.

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<u>West Medford Community Center</u> Elders provided with a lunch program, exercise program, health screening clinics and recreational activities.	05A	\$21,090.18 Funded \$21,090.18 Expended	326 Medford seniors participated in the programs offered. Additional programs and services are continuing to be added. Exceeded goals.	Increased accessibility to programs and services for West Medford seniors.

PLANNING AND ADMINISTRATION

The City managed the CDBG program and activities summarized in this report in an efficient manner, leveraging outside resources when possible. A total of \$218,394.92 was expended on planning and administration, representing 14.60 percent of the allocation for this program year.

2. Describe the manner in which the recipient would change its program as a result of its experiences.

The City will be updating plans and providing more detailed documentation of slums and blighted areas along with communication with HUD regarding the documentation of income eligibility by survey. In addition, the City is looking forward to utilizing data from the most recent census.

AFFIRMATIVELY FURTHERING FAIR HOUSING

3. Affirmatively Furthering Fair Housing:
 - a. Provide a summary of impediments to fair housing choice.
 - b. Identify actions taken to overcome effects of impediments identified.

The City of Medford Office of Human Diversity and Compliance is responsible for coordinating fair housing activities and outreach throughout Medford. The department oversees the Medford Human Rights Commission, its Fair Housing Sub Committee and the Commission for Persons with Disabilities, which address issues of socioeconomic and housing inequities in the City.

In 2012, Medford worked with partner communities in the North Suburban Consortium to develop an updated Analysis of Impediments (A.I.). With the help of consultant, OKM, NSC and its member communities, the A.I. identified several concerns as language and cultural differences, lack of awareness and understanding regarding fair housing laws, lack of income and a growing practice of online advertisements of properties for rent and sale. Actions undertaken to ameliorate impediments to fair housing choice throughout the past year included a number of activities: informing and

educating the public, handling complaints and concerns, enhancing local policy to prevent discrimination and improving access for non-English speaking and underserved residents.

The director of Human Diversity and Compliance, acting as the City's Fair Housing officer, continued efforts to collaborate with local realtors, lenders, landlords, residents and housing personnel. Workshops, forums and discussions were organized throughout the program year to educate the public on fair housing law. Medford's Language Access Plan also assists those in the community with limited English proficiency. A Language Line and local interpretation agency is available for translation services and fair housing documents are available in Spanish, Portuguese, Haitian Creole, and Vietnamese. The Fair Housing Officer is actively working on an updated Human Right/Fair Housing Ordinance to enhance public accommodation, as well as address gender identity and genetic issues. In addition, the Officer reviews affirmative marketing plans and packages in Local Action Unit applications for affordable housing to ensure active minority participation.

The City of Medford's 504 Plan covers issues of barrier removal modifications and policy accommodations. In the past program year, a training was held for City staff and Board Members to explain available accommodations and equipment to ensure access and properly serve persons with disabilities.

Committed to encouraging the participation of Women and Minority Owned businesses, Medford also has a system for handling Section 3 issues. This involves active participation by the City's Diversity Director during the various stages of the bidding process and annual appeals to area MBE/WBE/DBE's encouraging participation in city projects.

In addition:

- the Diversity Director meets with intended bidders at pre-bid to explain requirements
- Corresponding documentation 'to be signed off on' is included in the bid documents coordinated by the Purchasing Director
- When the low bidder is determined, the information is sent to the Diversity Director for sign off if the requirements have been met
- The contract is not signed until the Diversity Director sends approval to Purchasing Director

The Diversity Director has carried out all actions addressing barriers to Fair Housing and responding to goals set forth for the program year. Identified impediments and actions/activities undertaken are illustrated below. The first goal was to confront discrimination and exploitation based on race, class, gender, language, gender identification, disability, and other forms of difference that subtly or directly affect housing choice.

Impediment: To confront discrimination and exploitation based on

race, class, gender, language, disability, and other forms of difference that subtly or directly affect housing choice.

Actions: Fair housing outreach and education will be conducted throughout the community so there is a better understanding of rights and responsibilities.

The Diversity Office did offer training on a regional basis for housing personnel, landlords, property owners, bankers, real estate brokers, etc. Medford has been very aggressive in our programming across the city, as well as going beyond Medford to include communities across the region.

The Diversity Office contacted local banks and realtors informing them of their fair housing obligations.

The City continued its collaborations locally and regionally to gather information to act on housing issues and concerns before they become a housing impediment to our residents.

The office had an advertisement placed in the local newspaper for resident information and input asking about concerns and housing issues.

The Diversity Office works closely with residents concerned with discriminatory actions, although there has not been a specific issue that shows a pattern of discrimination.

The Medford Human Rights Commission, its Fair Housing Sub Committee, the Medford Commission for Persons with Disabilities, and the MA Association of Human Rights Commission, through the Diversity Office, addressed issues of socioeconomic inequities in our community. We are currently addressing health inequities and environmental injustice issues by working on a mobile food pantry for low income Medford residents.

The Diversity Director has been updating the City of Medford 504 Plan.

Impediment: Activities to ensure better enforcement of fair housing by better understanding housing choice, Section 8 certificates and voucher holders.

Actions: Outreach planning as a result of community input to address the myth of Section 8 certificates and vouchers.

The Diversity Director met with the Medford Housing Authority staff, Resident Opportunity Self Sufficiency staff (ROSS), and Family Self Sufficiency (FSS) Program Coordinating staff to initiate meaningful actions.

The Diversity Director has been working on an updated Human Right Ordinance to include public accommodation, as well as gender identity, and genetic issues.

Impediment: To reach out to the limited English speaking population to ensure they understand their rights under fair housing laws.

Actions: The Diversity Office worked to assist the local immigrant community by providing a better Language Access Plan.

The Diversity Director has developed a Language and Translation policy that coordinates with a Language Access Plan specific to our community for limited English proficient residents. As determined by our LAP, we have City documents translated into 5 languages: English, Spanish, Portuguese, Haitian Creole, and Vietnamese. This includes most DPW recycling, trash, street sweeping and snow emergency flyers.

To address immediate issues we utilize Language Line for interpretation and a local agency (Language Connections) for translations.

The Diversity Director has developed a forum for language access and disability training for city staff.

Impediments/Actions: To reach out to individuals with disabilities to ensure they understand their rights under fair housing laws and have the necessary access to housing opportunities.

The Diversity Director collaborated regularly with state agencies that oversee disability access and non-discrimination across the state to better serve the Medford community.

To ensure persons with disabilities are properly served by the City of Medford, the Diversity Director coordinated and conducted training for City Board and Commission Members as well as Department Heads. This training explained accommodations available and equipment training for requested accommodations. One such training included an event for City Board and City staff explaining available accommodations and equipment training for requested accommodations.

The Diversity Director also worked with the Health Department to develop and distribute a brochure on service animals and food establishments. This resulted from a specific concern about a person with a disability not being allowed into a restaurant with a service animal.

The Diversity Director collaborated on disability modifications for the MHS community Pool project, incorporating input for the design from EMARC, Inc.,

a private, non-profit that advocates on behalf of individuals with developmental disabilities.

To accommodate hearing-impaired residents, an FM System in our City Council Chambers, a pocket talker for small meetings, and a portable system for larger meetings around a table setting have been purchased for improved hearing of public speakers at public meetings.

The Diversity Office revises information as necessary and updates information that will help address the needs of individuals with disabilities by interacting with agencies such as Mass. Office on Disability, the Disability Policy Consortium, the local Disability Commission, the Special Education PAC, Mass. Commission Against Discrimination, and the Fair Housing Center of Greater Boston. These collaborations are crucial for outreach.

The Diversity Director continued collaboration with Tufts University Tisch College to develop needs based programming that benefit the community.

The City continued its plan to coordinate and initiate relevant local, state, regional, or HUD fair housing conferences and workshops. This past year we coordinated a regional program in Medford to assist HUD in reaching out about the Fair Housing/LGBT regulations.

4. Describe Other Actions in Strategic Plan or Action Plan taken to address obstacles to meeting underserved needs.

The Human Rights and Disability Commissions are working together on strategic planning efforts to make Medford a more welcoming community, as well as connecting with other local agencies to enhance city-wide coordination and efficiency.

The new Director of Resident Services at Medford Housing Authority, along with program staff, continued to reach out to tenants to provide much needed assistance in the areas of education, training, employment, financial planning and budgeting, problem resolution and much needed family services in the areas of physical and mental health and parenting. It is hoped these changes will provide the necessary housing and support services for the many families and elderly/disabled persons assisted by the MHA.

The Affordable Housing Development Specialist also has an essential role to include and assist the underserved. The barrier around access to information continues to be addressed. The greatest effort to address the needs of the underserved continues to be the working relationship and funding of public service agencies.

5. Leveraging Resources

- a. Identify progress in obtaining "other" public and private resources to address needs.

- b. How Federal resources from HUD leveraged other public and private resources.
- c. How matching requirements were satisfied.

The City was successful in using its CDBG funds to leverage other resources. The various public service agencies provided a combined total of over \$500,000.00 to offer quality social service programs to low and moderate income residents of Medford.

Medford Square has leveraged significant commitments from state government including \$ 800,000.00 for the design of a parking facility in Medford Square under the job creation program, MORE. The City is seeking to leverage additional funds from the state's MassWorks program for construction of the facility. The River's Edge project utilized a variety of state, federal and private resources as well as resources from a variety of academic institutions in the area.

The City completed its 7 year Open Space Plan using city funds. This plan facilitated leveraging of an additional \$400,000 in state PARC funds for the reconstruction of McNally Park. The City has also leveraged state, federal and private funds for the construction of the Senior Center Grounds at Clippership Linear Park.

Negotiations with developers have also resulted in the creation of affordable housing using private resources.

Managing the Process

- 1. Describe actions taken during the last year to ensure compliance with program and comprehensive planning requirements.

Program Year 4 CAPER Managing the Process response:

The Office of Community Development continues to provide quality management and oversight as directed by the HUD Field Office representatives, and continues to address compliance issues, improve spending, monitor staff time, hire and train staff to better fulfill objectives and monitor sub-recipients. The CDBG Administrator continues the financial management, contract compliance, reporting and monitoring functions of the office. Also acting as the Housing Development Specialist, the CDBG Administrator identifies and pursues housing opportunities that increase the production of affordable units and resolve housing issues in the City. The Economic Development Planner continues to review the conditions of neighborhoods and buildings in areas of the City, identifying plans for use of CDBG funds to upgrade the City's residential and commercial areas. Public hearings and citizen participation at the planning and project level continue to enrich the CDBG process and program.

Citizen Participation

1. Provide a summary of citizen comments.
2. In addition, the performance report provided to citizens must identify the Federal funds made available for furthering the objectives of the Consolidated Plan. For each formula grant program, the grantee shall identify the total amount of funds available (including estimated program income), the total amount of funds committed during the reporting period, the total amount expended during the reporting period, and the geographic distribution and location of expenditures. Jurisdictions are encouraged to include maps in describing the geographic distribution and location of investment (including areas of minority concentration). The geographic distribution and expenditure requirement may also be satisfied by specifying the census tracts where expenditures were concentrated.

Program Year 4 CAPER Citizen Participation response:

1. Public hearings for the City's Action Plan for this thirty-ninth program year were held on February 28, 2013, March 26, 2013 and April 23, 2013. Verbal comments were received from citizens, including seniors, public housing residents and program beneficiaries, City Departments, Public Service agencies and non-profits expressing their continued support of public service programs. Citizen comments received during the planning and reporting process and the City's responses are included in Appendix A.

During the program year, the City coordinates on an ongoing basis with citizens around project related issues. Additionally, coordination meetings are held with a variety of public agencies, nonprofits, citizens and property owners to develop capacity, implement activities and define new projects.

2. RESOURCES AVAILABLE AND GEOGRAPHIC DISTRIBUTION

Resources available to the City included \$1,476,311.00 in PY39 CDBG funds and \$4,569.65 in program income from repayment of housing loans. A total of \$2,833,834.66 was expended, including \$218,394.92, for planning and administration.

The City focused its CDBG resources during the program year through citywide services and investments in specific neighborhoods, as follows (excluding planning and administration expenses).

- **Medford Square/Central Medford (Tract 3391)** - A building envelope study and design were completed on the Senior Center, in addition to plans for the Senior Center Grounds as part Clippership Linear Park. The Center also received public service funding for senior programming. Removal of Architectural Barriers at the Community Schools Pool and Locker room near completion. \$476,769.88 was expended, representing 18.2% of Program Year expenditures.

- **Brooks Estates (Tract 3392)** - Funding of \$110,635.87 was expended toward the construction of a handicap lift to remove Architectural Barriers to the Shepherd Brooks Estate Manor. 4.2% of expenditures were made in this area.
- **West Medford (Tract 3393)** - West Medford is a significantly diverse neighborhood with relatively high density. The area is home to 30% of the City's African American residents and the neighborhood itself is 34.44% African American. This year funds were expended at the West Medford Community Center for elderly social services. An affordable rental housing project that created two new rental units was completed and occupied. \$19,185.00 was expended on this project, representing 0.7 % of total expenditures.
- **Central Medford (Tract 3395)**-The project was closed out and expenses finalized, with \$4,404.77 spent, representing .2% of total expenditures.
- **South Medford (Tract 3396 and 3397)** –Reconstruction of Columbus Park was completed, with \$372,392.78 was expended. Roadway work is underway at Alexander and Trout Avenues and Eliot Street. \$1,113,335.12 has been spent this year. Expenditures in this neighborhood represent 56.8% of total disbursements for this program year.
- **Glenwood/Haines Square/Fulton Heights (Tract 3399 & 3400)** Removal of Architectural Barriers to Morrison and Hickey parks nears completion with \$298,759.42 expended, representing 11.4% of total expenditures.
- **Citywide (as noted above)** – The balance of expenditures, 8.4%, were on public services, which were administered citywide to eligible persons.

NOTE: The Map Appendix includes a map illustrating geographic distribution.

Institutional Structure

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

Program Year 4 CAPER Institutional Structure response:

The City has strengthened its role with private entities to meet its goals and objectives, in particular working with private developers and a local CHDO, Medford Community Housing, to produce housing. Efforts are continuing

with nonprofits to purchase and renovate small multi-family rental properties. Capacity building of small, public service providers, with a particular emphasis on outreach to minorities, has also been a focus and staff has educated themselves to provide support to such agencies.

Monitoring

Program Year 4 CAPER Monitoring response:

1. Describe how and the frequency with which you monitored your activities.

Public Services: Over the course of the program year, select public service subrecipients received on-site visits from the administrator. On-site monitoring included evaluation of program progress, program management, benefit to low and moderate income Medford residents and record-keeping with regard to finances and beneficiary information. All agencies have met with the Grant Administrator, have had training on proper and timely reporting and invoicing, and have had ongoing communications throughout the program year. Agencies submit a report with each invoice detailing the financial status of the award and provide quarterly reports with accomplishments and beneficiary data. Additionally, there have been frequent telephone and email communication with each Public Service agency to monitor progress.

Construction Projects: The Massachusetts Building Codes and local zoning and subdivision requirements were followed with close cooperation between appropriate City officials and professional consultants. Public procurement is conducted with the guidance of the Chief Procurement officer. Davis-Bacon compliance is done in-house and, when applicable, by the project manager. Construction is monitored on-site on a daily basis by a clerk of the works or inspector. Weekly project team meetings, including architects, contractors, city officials and on-site clerk of the works or inspector, are held to track progress and resolve issues.

2. Describe the results of your monitoring including any improvements.

The results of the Public Services monitoring have been very good. All agencies were provided with templates for reporting progress that will accompany each invoice as well as a template for quarterly accomplishment and beneficiary reporting. This will assist them in tracking their progress, as well as improving reported data.

On-site monitoring visits were conducted with a sampling of Public Service agencies during this program year. Each agency monitored provided valuable information on their accomplishments and areas needing assistance. Each of these concerns were addressed and notable improvements made, further assisting the Medford community.

3. Self Evaluation

- a. Describe the effect programs have in solving neighborhood and community problems.

The Community Development Block Grant program and activities is one of the most effective tools municipal governments have to address community development problems. The water, sewer and street construction activities ensure public health safety and welfare. It is one of the only sources of funding to address the removal of Architectural Barriers to achieve handicapped accessibility. In addition, the provision of public services with their vast array of programs is essential to the wellbeing of citizens, ensuring their active participation in community life.

- b. Describe progress in meeting priority needs and specific objectives and help make community's vision of the future a reality.

The overall vision for the City is to provide a vibrant community with decent housing, safe neighborhoods, a sound educational system and opportunities for employment. The CDBG program addresses many of these core areas through the achievement and implementation of specific objectives. As outlined in other sections of this report, a variety of activities were conducted to achieve the following objectives: a suitable living environment, creation of economic opportunities and improving the quality of life for low and moderate income people.

- c. Describe how you provided decent housing and a suitable living environment and expanded economic opportunity principally for low and moderate-income persons.

Activities included increasing affordable home ownership opportunities, upgrading essential infrastructure systems, roadway and park improvements in Medford Square. These are detailed in relevant sections of the report.

The North Suburban HOME Consortium managed the process of providing downpayment and closing cost homeownership assistance to Medford residents, as well as working with Medford Community Housing to increase the number of first-time homebuyer workshops within the City of Medford.

A lift to remove architectural barriers at the shepherd Brook Estate is under construction and nearing completion.

- d. Indicate any activities falling behind schedule.

Activities are on schedule. This contributed to the City having to increase expenditures to meet the timeliness requirement. Since many projects are weather dependent, this requires careful

coordination. The City believes it is on track to meet the timeliness requirement for this May.

- e. Describe how activities and strategies made an impact on identified needs.

Activities and strategies impacted needs by providing properly designed infrastructure and by providing essential services by public service agencies to address various needs of people.

- f. Identify indicators that would best describe the results.

Indicators that best describe results include the ability of individuals to access transportation, meals and health services, and the number of feet of sidewalk, streets, water and sewer utilities installed, and the appearance of facilities upgraded. A project to remove Architectural Barriers to the Shepherd Brooks Manor historic property nears completion, along with removal of Architectural Barriers at Morrison & Hickey Parks and MHS Community School project.

- g. Identify barriers that had a negative impact on fulfilling the strategies and overall vision.

The single largest barrier continues to be funding. Sources of revenue to the City as well as to the nonprofits are becoming increasingly constrained and are affecting the ability to provide services.

- h. Identify whether major goals are on target and discuss reasons for those that are not on target.

Public service goals are on target. The provision of infrastructure improvements is on target. The elimination of slums and blight and the creation of an economic development program utilizing federal funds are limited.

- i. Identify any adjustments or improvements to strategies and activities that might meet your needs more effectively.

An economic development plan targeting low and moderate income jobs may be useful. Outside assistance to nonprofits may be necessary to foster growth and viability of their organizations.

Lead-based Paint

1. Describe actions taken during the last year to evaluate and reduce lead-based paint hazards.

Program Year 4 CAPER Lead-based Paint response:

In Year 4, The Affordable Housing Specialist provided homeowners Lead Paint information.

HOUSING

Housing Needs

*please also refer to the Housing Needs Table in the Needs.xls workbook.

1. Describe Actions taken during the last year to foster and maintain affordable housing.

Program Year 4 CAPER Housing Needs response:

As a member community of the North Suburban HOME Consortium (NSC), Medford assisted three first-time homebuyers with the HOME Downpayment Assistance program. In addition, 98 families completed first-time homebuyers workshops in the City of Medford

The City managed rehabilitation loans for 26 households. Four of these loans provided monthly mortgage payments totaling \$4,569.65, while the other 22 are deferred - due when the home transfers ownership. During Year 4, two active rehab loans were paid-in-full.

The Housing Development Specialist also continued to provide technical assistance to Medford Community Housing to explore future development and funding opportunities, including the redevelopment of a parsonage house owned by West Medford Baptist Church. She was also an active participant in the North Suburban HOME Consortium (NSC) and Malden-Medford Continuum of Care (CoC).

Medford also participates in community housing conversations with Metropolitan Boston Housing Partnership. These meetings enable the City to collaborate efforts of the people who serve Medford residents every day, as well as provide input regarding their needs. Information sharing to keep current on available programs for Medford residents is also achieved. These collaborations allow the City to know about State-wide funding opportunities that help extremely low income households.

Specific Housing Objectives

Program Year 4 CAPER Specific Housing Objectives response:

1. Evaluate progress in meeting specific objective of providing affordable housing, including the number of extremely low-income, low-income, and moderate-income renter and owner households comparing actual accomplishments with proposed goals during the reporting period.

In total, for Year 4, Medford assisted two new households in acquiring downpayment and closing cost assistance to purchase, while closing out an additional project. In addition, 98 households completed a first-time homebuyers workshop conducted by Medford Community Housing, at the administrative offices of Medford Housing Authority.

Housing Results

Table 7: Housing Results

Downpayment Assistance for First-time homebuyers (HOME)						
Address	Amount	Number of Units	Household Size	Race/Ethnicity	Income	Elderly
122 Sharon Street	\$25,000	1	2	Asian	between 60-80 AMI	N
55 Sharon Street	\$63,860	1	3	Black	between 60-80 AMI	N
109 First Street	\$7,500	1	1	White	between 60-80 AMI	N
Total	\$96,360	3	6			

- Evaluate progress in providing affordable housing that meets the Section 215 definition of affordable housing for rental and owner households comparing actual accomplishments with proposed goals during the reporting period.

All of Medford’s affordable housing meets Section 215 requirements except that not all rental units are affordable to or inhabited by families earning less than 50% or 65% of AMI. All rental units have a rent set to be affordable for families earning not more than 70% AMI, which makes them affordable for households with a lower income only if they hold a Section 8 or Massachusetts Rental Voucher Program (MRVP) voucher. The City’s goals for all affordable units are that they are legally restricted for the long term, ideally in perpetuity, and that all units are affordable under Massachusetts’ Chapter 40B law. Chapter 40B requires units to be affordable for households earning no more than 80% AMI. The City aims for all future rental units to be affordable for households earning no more than 60% AMI.

- Describe efforts to address “worst-case” housing needs and housing needs of persons with disabilities.

Medford continues active involvement in the Malden-Medford Continuum of Care (CoC) and the Tri-City Continuum of Care Homeless Task Force, made up of a range of agencies and organizations from Medford, Malden and Everett. The CoC has again applied for McKinney Vento and other funds to support and expand its shelter and case management services for extremely low income individuals and families, including those with intellectual and physical disabilities. The CoC applied for and received State (Emergency Solution Grant Funds).

Medford residents also benefit from our partnership with the cities of Malden and Everett in an Emergency Services committee. Under this partnership, we are able to provide emergency assistance for families who have fallen behind in their rent or mortgage payments or who cannot afford their heating or cooling bills. The City also awarded \$1,167.00 in Block Grant funds to the Salvation Army for the provision of emergency services to Medford residents.

Medford is aware that the strong housing market of the early 2000's has resulted in an acute housing crisis that cannot be fixed overnight. The City continues to seek opportunities to create more units of housing to serve lower income households and to continue supporting the range of social service organizations that provide assistance to our lowest income residents, including those who are disabled.

Public Housing Strategy

1. Describe actions taken during the last year to improve public housing and resident initiatives.

Program Year 4 CAPER Public Housing Strategy response:

The MHA continued its efforts to improve the public housing stock within its portfolio. Projects completed in the past year include new granite curbing at 121 Riverside Ave. (elderly housing), upgraded crawlspace ventilation and a new handicapped accessible bathroom at 22 Allston Street (elderly housing), new roofs at the Willis Ave. maintenance buildings (family housing site), and new HVAC systems at a two (2) unit special needs housing program on Foster Court (Ch. 689). The estimated total cost for these projects is \$500,000.

The MHA also had several key senior management position changes in the past year. A new Associate Executive Director position was filled, a new position of Director of Resident Services was filled by an in-house transfer and a replacement Director of Finance was hired. The new Director of Resident Services, along with program staff, continued to reach out to tenants to provide much needed assistance in the areas of education, training, employment, financial planning and budgeting, problem resolution and much needed family services in the areas of physical and mental health and parenting. It is hoped these changes will provide the necessary housing and support services for the many families and elderly/disabled persons assisted by the MHA.

Barriers to Affordable Housing

1. Describe actions taken during the last year to eliminate barriers to affordable housing.

Program Year 4 CAPER Barriers to Affordable Housing response:

The MHA continued its efforts to eliminate barriers in Year 4. As noted above, one existing HP unit at 22 Allston Street/Tempone Apartments received a \$70,000 upgrade to improve accessibility. In addition, the new Director of Resident Services along with program staff continued to reach out to tenants to provide much needed assistance in the areas of education, training, and employment; financial planning and budgeting; problem resolution; and much needed family services in the areas of physical and mental health and parenting.

Further, staff worked closely with Mystic Valley Elder Services in their submission of a Supportive Services Program application to the Executive Office of Elder Affairs for the 121 Riverside Ave. site, a two hundred unit elderly housing complex. The grant, if funded, would assist these tenants, in arranging much needed services, to age in place.

And finally, the Resident Services staff was successful in receiving a small grant from Medford Health Matters to hire a case manager to be assigned to the Walkling Court, state aided elderly housing site. Over the next year a part time, bi-lingual (Haitian Creole) case manager will work with tenants to both assess their needs and arrange for the delivery of services so they too can live more independently.

The greatest barriers to affordable housing are housing costs, increasing cost of living, reduced access to financing and growing unemployment. The City of Medford housing costs continue to be higher than the majority of North Suburban Consortium member communities. A family of four with income at or below \$65,000 simply cannot afford to purchase a home in Medford where the current single family home price is on the market for \$386,000 and a condo is \$296,000.

Due to the high cost of real estate in the City of Medford, acquiring viable properties is difficult. However, Medford Community Housing continues to work to acquire and develop property in Medford, because this is their mission. They have completed the conversion of an existing commercial building owned by West Medford Baptist Church turning it into two affordable rental units available to households at or below 60% AMI.

Medford Community Housing also performs outreach to realtors and bankers inviting them to inform interested homebuyers of various opportunities and mortgage products available to them. Over the past year, 98 individuals participated in the 9-hour first-time homebuyers workshop.

The City negotiated with Criterion Development Partners to have 10% or 16 units, be affordable under Department of Housing and Community Development, Local Action Unit Program. These units are under construction and will be marketed to households at or below 80% AMI. The rents will be

set based on 30% of 80% income limits, minus utility allowances, effectively less than High HOME rents. These units should be occupied by the end of 2014. They will be a mixture of studio's, one bedroom and two bedroom units. The City also negotiated one unit of affordable housing at the 24-30 High Street project in Medford Square. This unit was occupied early 2014. These efforts were completed with private funds.

HOME/American Dream Downpayment Initiative (ADDI)

1. Assessment of Relationship of HOME Funds to Goals and Objectives
 - a. Evaluate progress made toward meeting goals for providing affordable housing using HOME funds, including the number and types of households served.
2. HOME Match Report
 - a. Use HOME Match Report HUD-40107-A to report on match contributions for the period covered by the Consolidated Plan program year.
3. HOME MBE and WBE Report
 - a. Use Part III of HUD Form 40107 to report contracts and subcontracts with Minority Business Enterprises (MBEs) and Women's Business Enterprises (WBEs).
4. Assessments
 - a. Detail results of on-site inspections of rental housing.
 - b. Describe the HOME jurisdiction's affirmative marketing actions.
 - c. Describe outreach to minority and women owned businesses.

Program Year 4 CAPER HOME/ADDI response:

1. Assessment of Relationship of HOME Funds to Goals
The City of Medford continues to work with homeowners to access HOME funds for downpayment and closing cost assistance. Three households accessed funds this past year.

2 – 4. HOME Reports

ADDI funds accessed by Medford residents come through the North Suburban HOME Consortium (NSC), which administers a downpayment and closing cost program. The NSC provides a full report on this program in its own CAPER.

HOMELESS

Homeless Needs

*Please also refer to the Homeless Needs Table in the Needs.xls workbook.

1. Identify actions taken to address needs of homeless persons.
2. Identify actions to help homeless persons make the transition to permanent housing and independent living.
3. Identify new Federal resources obtained from Homeless Super NOFA.

Program Year 4 CAPER Homeless Needs response:

1. Identify actions taken to address needs of homeless persons.

The City of Medford is an active participant in the Malden Medford Continuum of Care that in 2013-2014 secured \$1,787,453 in McKinney-Vento Continuum of Care renewal funding for:

- Two permanent housing projects, providing 25 units of permanent supportive housing for homeless individuals and families (Homeless to Housing; Homeless to Housing Expansion),
- One transitional housing program for 7 homeless families (Medford Family Life),
- One transitional housing program for 11 homeless individuals (Kaszanek House),
- One permanent housing program for 14 homeless individuals (Washington Street),
- A supportive services program, the Tri-City Mobile Homeless Outreach Team, serving approximately 150 homeless individuals annually.
- Stepping Stones and Stepping Stones Expansion—15 units of scattered site permanent housing with intensive case management for chronically homeless individuals,
- Disabled Family Leasing—three 3-bedroom apartments and clinical case management for homeless families with a disabled head of household.

New bonus funding provided some CoC support for HMIS services.

All the units above are eligible for Medford families and individuals who meet the criteria to live in those units.

Units that are physically located in Medford are:

- One transitional housing program for seven homeless families (Medford Family Life),
- 8 scattered site permanent supportive housing for families and individuals run by Heading Home,
- 2 units of family scattered site transitional housing run by Heading Home,
- 2 units of family scattered site shelter run by Heading Home,
- 9 scattered site permanent supportive housing for families run by Housing Families, Inc.
- 3 units of family scattered site shelter run by Housing Families, Inc.

Another project, Stepping Stones, is a five-unit permanent supportive housing project, which began operation in January 2008. Stepping Stones provides affordable housing and intensive case management for chronically homeless individuals.

The CoC continues to operate a mixture of transitional, permanent, and supportive services to address needs of homeless persons in the Tri-City area.

Medford also directly funds agencies that provide direct care and shelter to the homeless population. This includes the following organizations and programs:

Medford Family Life:	Transitional housing and case management to find permanent housing, employment, day care and other needs,
Bread of Life:	Pantry, prepared food and clothing for homeless and very low income households as well as referrals for emergency assistance, counseling and medical care,
Salvation Army:	Meals, emergency assistance and financial counseling.

2. Identify actions to help homeless persons make the transition to permanent housing and independent living.

The CoC has seen a number of its transitionally housed families and individuals secure permanent housing through its own permanent housing programs – Homeless to Housing, Homeless to Housing Expansion, and Stepping Stones Expansion (35 units).

The CoC also assists chronically homeless households in accessing mainstream resources such as housing authority units and Section 8 mobile vouchers. It is also working to create new permanent housing units for

chronically homeless individuals – such as the project at 115 Washington Street with 11 SRO units. Furthermore, it assists with career and job training in order to move chronically homeless households towards independence and permanent housing free of subsidy.

3. Identify new Federal resources obtained from Homeless Super NOFA.

The funding was used to maintain existing programs as defined in the following chart:

Table 8: McKinney 2013-2014 Continuum of Care

HUD-defined CoC Name:* Malden-Medford CoC					CoC #: MA-513			
(1) SF-424 Applicant Name	(2) Project Sponsor Name	(3) Project Name	(5) Requested Project Amount (actuals)	(6) Term	(7) Program and Component Type			
					SHP New	SHP Renewal	S+C New	S+C Renewal
Heading Home, Inc.	Heading Home, Inc.	Tri-City Stepping Stones 3	\$223,147	1		X		
Housing Families Inc.	Housing Families Inc.	Disabled Family Leasing-1	\$134,565	1		x		
Housing Families Inc.	Housing Families Inc.	Disabled Family Leasing-II	\$ 71,492	1		x		
Heading Home, Inc.	Heading Home, Inc.	Homeless to Housing	\$549,701	1		x		
Heading Home, Inc.	Heading Home, Inc.	Expansion Disabled Family	\$ 64,884	1		X		
Heading Home, Inc.	Heading Home, Inc.	Medford Family Life	\$177,409	1		x		
Tri-City Community Action Program	Tri-City Community Action Program	Kaszanek Transitional House	\$173,961	1		x		
Tri-City Community Action Program	Tri-City Community Action Program	Mobile Homeless Outreach Team	\$172,458	1		x		
Malden Housing Authority	Heading HOME, Inc.	Tri-City Shelter+Care	\$124,916	1		X		
Tri-City Community Action Program	Tri-City Community Action Program	Washington Street Residence	\$ 88,104	1		X		
Tri-City Community Action Program	Tri-City Community Action Program	CoC HMIS	\$ 6,816	1		X		
Total CoC Amount Received:			\$1,787,453					

Specific Homeless Prevention Elements

1. Identify actions taken to prevent homelessness.

Program Year 4 CAPER Specific Housing Prevention Elements response:

Medford is an active participant in the Tri-City Continuum of Care Homeless Task Force, largely made up of agencies that provide direct services to the homeless from Malden, Everett and Medford. Participation in this task force enables the City to better understand local homelessness issues and solutions and to know best how to refer families who may come directly to City Hall for assistance.

Additionally, the City of Medford funds nonprofit organizations that seek to prevent homelessness:

- Tri-CAP's Pro Bono Legal Project provides legal advice, information, advocacy, referral and representation to low income residents seeking assistance with non-fee generating civil law problems – a significant number of such cases are eviction cases,
- Emergency Assistance at Salvation Army assists families who may be marginally behind on rent or mortgage or need assistance to cover energy or other housing related costs,
- Medford Family Life/Heading Home, Inc. assists homeless families by providing temporary housing, case management, life skills/parenting support and housing search assistance,
- Consumer Advisor Commission provides advocacy and referral for consumer issues, many of them being tenant landlord related.

The City's Affordable Housing Development Specialist was available to local residents to answer questions regarding rent increases, evictions and housing searches and to refer residents to appropriate agencies for further assistance. As needed, she provided written material to tenants on tenant/landlord rights and responsibilities. She also coordinated with Tri-CAP to assist tenants in preserving their tenancies when required. This was valuable to prevent loss of tenants' housing in cases such as rent increases.

Emergency Shelter Grants (ESG)

Program Year 4 CAPER ESG response:

While the City of Medford was not a recipient of ESG funds during the program year, the Malden/Medford CoC applied to the MA Department of Housing and Community Development for Emergency Shelter Grants to be shared by Tri-CAP and Just a Start in order to combat homelessness, support shelters, and provide supportive services for the families of displaced and homeless citizens. The funding will serve very specific households housed in

Malden, Medford or Everett who are below 30% MFI and in danger of becoming homeless. Additionally, the funds will support the creation of emergency shelter units for families fleeing domestic violence.

COMMUNITY DEVELOPMENT

Community Development

Program Year 4 CAPER Community Development response:

1. Assessment of Relationship of CDBG Funds to Goals and Objectives
 - a. Assess use of CDBG funds in relation to the priorities, needs, goals, and specific objectives in the Consolidated Plan, particularly the highest priority activities.

The City expended its funds consistent with the priorities and goals and objectives as outlined in its consolidated plan; all areas of funding were of high or medium priority. Due to funding limitations, not all needs were addressed nor were all high priority needs funded.

- b. Evaluate progress made toward meeting goals for providing affordable housing using CDBG funds, including the number and types of households served.

This information is provided in Table 7: Housing Results, on Page 34.

- c. Indicate the extent to which CDBG funds were used for activities that benefited extremely low-income, low-income, and moderate-income persons.

The Housing Results table provides housing benefits by income group.

Funds expended for non-housing activities, representing a 99.92% low- to moderate-income benefit, are broken down by income category as follows:

- Extremely low-income .6%,
- Low-income 99.3%,
- Moderate-income .02%.

2. Changes in Program Objectives
 - a. Identify the nature of and the reasons for any changes in program objectives and how the jurisdiction would change its program as a result of its experiences.

Public service objectives were changed slightly due to changes in agency operation. Work with nonprofits must adapt to the increasing pressures they are facing in service delivery with less funding.

3. Assessment of Efforts in Carrying Out Planned Actions
 - a. Indicate how grantee pursued all resources indicated in the Consolidated Plan.

The City applied for and received its federal funds in the amounts available to it. Additionally, program income was expended as required on eligible activities. In circumstances where resources were administered by other entities, the City cooperated and supported their use of funds.

b. Indicate how grantee provided certifications of consistency in a fair and impartial manner.

The City provided all certifications as necessary and is required, complying with them by following rules and regulations and implementing activities with responsibilities as set forth in the certifications.

c. Indicate how grantee did not hinder Consolidated Plan implementation by action or willful inaction.

The City did not hinder the implementation of its Consolidated Plan by any willful action. It cooperated with all entities seeking funds to implement activities and worked toward achieving the City's goals and objectives.

4. For Funds Not Used for National Objectives

Not applicable. All funds were used to satisfy a national objective.

5. Anti-displacement and Relocation – for activities that involve acquisition, rehabilitation or demolition of occupied real property

Not Applicable. The City did not have any relocation activities.

6. Low/Mod Job Activities – for economic development activities undertaken where jobs were made available but not taken by low- or moderate-income persons

River's Edge continues to progress, reporting the creation of 450 jobs and 100% occupancy. Businesses include Management Sciences for Health (MSH), Marriott, Aetna Student Health, Progenika, Labthink, Preotle, Lane& Associates and Unidine. The project area has become an active neighborhood in the City.

7. Low/Mod Limited Clientele Activities – for activities not falling within one of the categories of presumed limited clientele low and moderate income benefit

a. Describe how the nature, location, or other information demonstrates the activities benefit a limited clientele at least 51% of whom are low- and moderate-income.

Public services and micro-enterprise services, non- presumed eligible, low and moderate income clientele are serviced through agencies, reported on quarterly and annual reports to the Office of Community Development and subject to monitoring.

8. Program income received

- a. Detail the amount of program income reported that was returned to each individual revolving fund, e.g., housing rehabilitation, economic development, or other type of revolving fund.

The Housing Rehabilitation fund received program income of \$4,569.65 for monthly mortgage payments.

- b. Detail the amount repaid on each float-funded activity.
The City did not have any float-funded activities.

- c. Detail all other loan repayments broken down by the categories of housing rehabilitation, economic development, or other.

All loan repayments were for Housing Rehabilitation and as described above.

- d. Detail the amount of income received from the sale of property by parcel.

The City did not sell any parcels of property acquired with CDBG funds.

9. Prior period adjustments – where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:
 - a. The activity name and number as shown in IDIS;
 - b. The program year(s) in which the expenditure(s) for the disallowed activity(ies) was reported;
 - c. The amount returned to line-of-credit or program account; and
 - d. Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

The City did not have any such adjustments.

10. Loans and other receivables

- a. List the principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.

The City did not have any float-funded activities.

- b. List the total number of other loans outstanding and the principal balance owed as of the end of the reporting period.

The City currently holds two active Housing Rehabilitation loans with a combined principal balance of \$30,538.26.

- c. List separately the total number of outstanding loans that are deferred or forgivable, the principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.

The City holds approximately 20 deferred Housing Rehabilitation loans with a combined principal balance of \$358,762.00. The terms of these deferred loans are that they are given interest-free, and that the principal balance is owed to the City when the property transfers to a new owner.

- d. Detail the total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.

No loans were written off or forgiven.

- e. Provide a List of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.

No parcels were purchased.

11. Lump sum agreements

Not applicable.

12. Housing Rehabilitation – for each type of rehabilitation program for which projects/units were reported as completed during the program year

CDBG funds were not utilized on any housing rehabilitation activities during the program year.

13. Neighborhood Revitalization Strategies – for grantees that have HUD-approved neighborhood revitalization strategies

The City does not have any approved neighborhood revitalization strategy areas.

Antipoverty Strategy

1. Describe actions taken during the last year to reduce the number of persons living below the poverty level.

Program Year 4 CAPER Antipoverty Strategy response:

In Year 4, the City of Medford employed a range of strategies to reduce the financial burdens of families living in poverty and to assist such families in being able to focus on moving out of poverty. Strategies included:

- Funding social service programs such as food pantries, family counseling, youth tutoring, childcare, legal aid and transportation,
- Creating affordable housing opportunities,
- Planning and implementing the revitalization of Medford Square with a significant goal in this process being the creation of a range of jobs across skill levels,

- Participating in the planning of the River’s Edge development at the intersection of Medford, Malden and Everett, which includes significant workforce development component.
- Participating in the Continuum of Care to enhance coordination efforts with service providers.

NON-HOMELESS SPECIAL NEEDS

Non-homeless Special Needs

*Please also refer to the Non-homeless Special Needs Table in the Needs.xls workbook.

1. Identify actions taken to address special needs of persons that are not homeless but require supportive housing, (including persons with HIV/AIDS and their families).

Program Year 4 CAPER Non-homeless Special Needs response:

The City of Medford meets the needs of non-homeless residents with special needs through a range of ongoing programs for residents with disabilities, elderly and frail elderly residents. The programs, outcomes and benefits are specifically addressed in the Public Services section.

Specific HOPWA Objectives

Program Year 4 CAPER Specific HOPWA Objectives response:

The City of Medford did not receive HOPWA funds during the program year.

OTHER NARRATIVE

Include any CAPER information that was not covered by narratives in any other section.

Program Year 4 CAPER Other Narrative response:

Financial Summary Reports

City of Medford
CDBG Expenditures-Year 39

July 1, 2013 - June 30, 2014

<u>Activity#</u>	<u>Activity Name</u>	<u>Matrix Code</u>	<u>National Objective</u>	<u>Expenditures</u>
	Public Services	05-05W	LMC	\$ 219,956.90
2013-0005-787	Roadway Reconstruction – Alexander, Eliot, Trout	03K	LMA	\$ 1,113,335.12
2012-0021-766	Removal of Architectural Barriers - Shepherd Brooks Estate	03	LMC	\$ 110,635.87
2012-0020-762	Housing – 61 Boston Avenue	14B	LMH	\$ 19,185.00
2010-0025-716	Removal of Architectural Barriers – Edgerly Field	03	LMC	\$ 5,440.00
2011-0025-740	Removal of Architectural Barriers- Barry Park	03L	LMC	\$ 4,404.77
2012-0021-763	Removal of Architectural Barriers – Morrison & Hickey Parks	03F	LMC	\$ 298,759.42
2012-0021-764	Reconstruction – Columbus Park	03F	LMC	\$ 372,392.78
2012-0021-765	Removal of Architectural Barriers – Community Schools Pool & Locker Room	03	LMC	\$ 408,162.74
2013-0004-767	Senior Center Physical Improvements- Senior Center Grounds Improvements	03A	LMC	\$ 48,460.00
2013-0004-768	Senior Center Physical Improvements- Senior Center Building Improvements	03A	LMC	\$ 14,707.14
2012-0001-743	Planning & Administration	21A	N/A	\$ 218,394.92
Total:				\$ 2,833,834.66

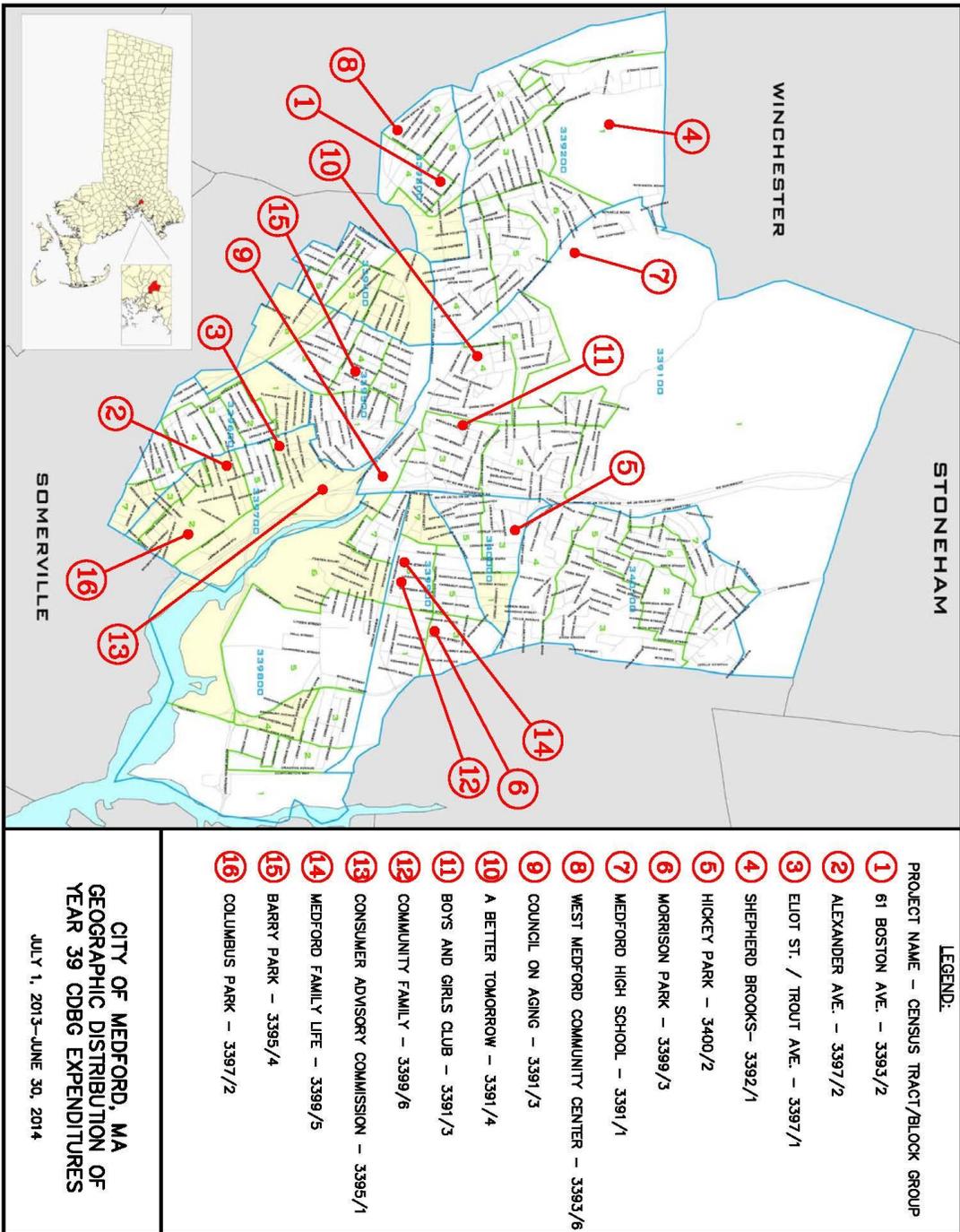
City of Medford**Public Services Expenditures-Year 39**
July 1, 2013 - June 30, 2014

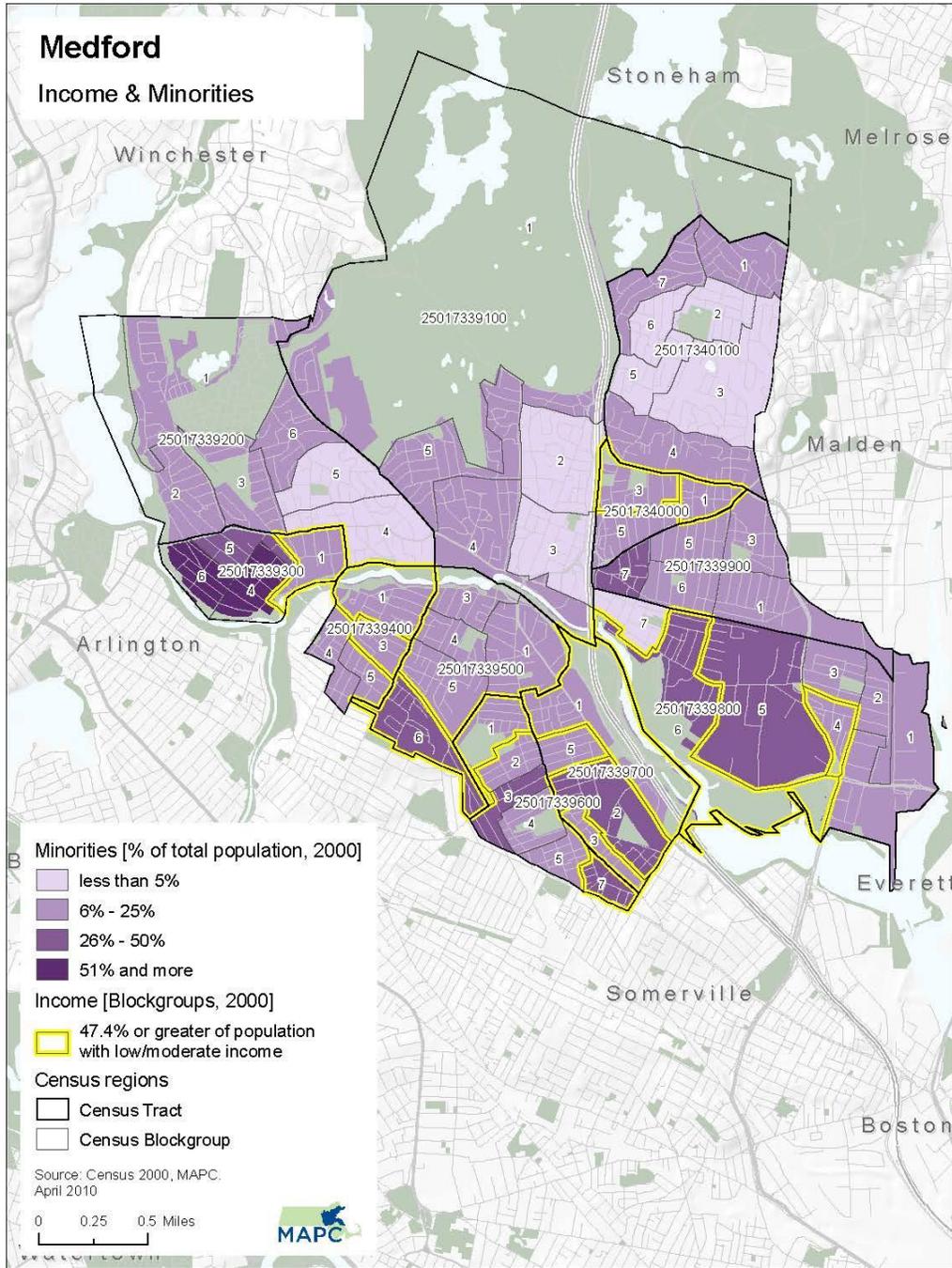
<u>IDIS Activity #</u>	<u>Agency</u>	<u>Expenditures</u>
2013-0002-771	A Better Tomorrow Services	\$ 3,891.00
2013-0002-777	Arc of Eastern Middlesex	\$ 4,669.00
2013-0002-772	Boys & Girls Clubs	\$ 1,945.00
2013-0002-773	Bread of Life	\$ 1,052.00
2013-0002-774	Community Family	\$ 1,752.00
2013-0002-775	Consumer Advisory Commission	\$ 7,004.98
2013-0002-776	Council on Aging	\$ 60,438.81
2013-0002-778	Medford Family Life/Heading Home, Inc.	\$ 3,891.00
2013-0002-779	Immigrant Learning Center	\$ 3,891.00
2013-0002-780	Medford Public Schools (Early Childhood Afterschool)	\$ 8,760.00
2013-0002-781	Mystic Valley Elder Services	\$ 8,405.00
2013-0002-782	Salvation Army	\$ 1,167.00
2013-0002-783	SCM Transportation	\$ 86,395.93
2013-0002-784	Tri-CAP	\$ 5,604.00
2013-0002-785	West Medford Community Center	\$ 21,090.18
	Total:	\$ 219,956.90

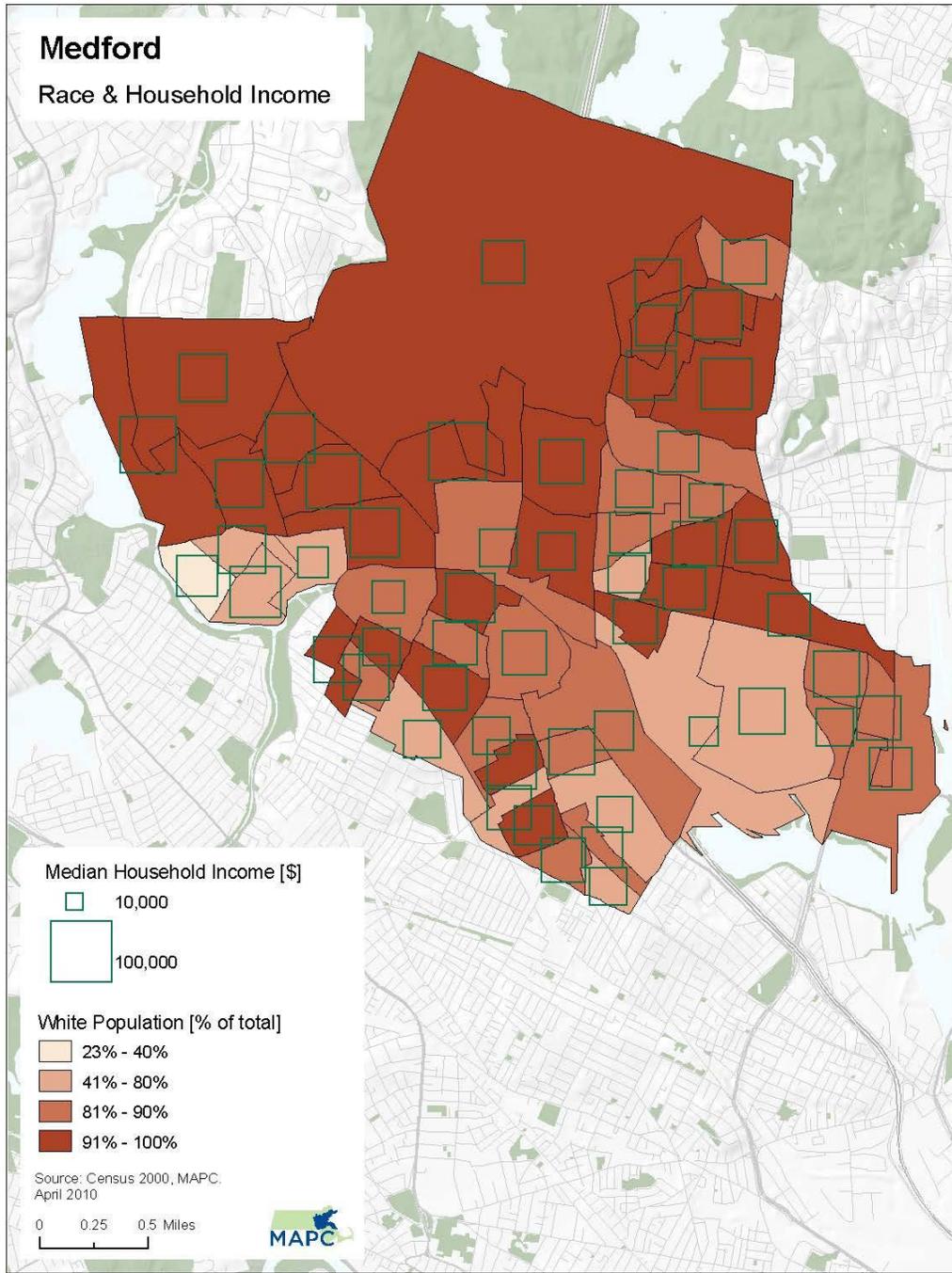
Project Sheets

Tables

Maps







IDIS Reports

IDIS PR 01 Report

IDIS PR 03 Report

IDIS PR 06 Report

IDIS PR 09 Report

IDIS PR 10 Report

IDIS PR 23 Report

IDIS PR 26 Report

IDIS PR 59 Report