

**Program Year 40
Fifth Year DRAFT
Consolidated Annual Evaluation &
Performance Report (CAPER)
July 1, 2014 – June 30, 2015**



City of Medford, Massachusetts

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Fifth 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 5 CAPER Executive Summary response:

The Year 5 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 fifth program year of the Five Year Consolidated Plan, for the period of July 1, 2014 through June 30, 2015. The City of Medford received \$1,439,772.00 in CDBG funds, a decrease of \$36,539 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 CDBG 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 is best suited to address those needs within the limits of available resources. Efforts in the fifth program year were focused on public service delivery, creation of affordable housing, implementation of accessibility improvements at the Medford High School Pool and the historic Shephard Brooks Estate and public facilities improvements including roadway, sidewalk and park improvements as well as design of improvements to the Medford Senior Center.

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.

Reconstruction was substantially completed on Alexander Avenue, Trout Avenue and Elliot Street in South Medford.

In its commitment to expand the City's affordable housing stock, the City continued to partner with non-profit and for-profit developers to create additional opportunities for low-and-moderate income renters and homebuyers. Medford Community Housing, a non-profit Community Development Organization, completed the acquisition and renovation of a two-bedroom rental unit restricted to households earning 60% or less of the area median income (AMI). Project financing was made possible through NSC HOME funds, the City of Medford Community Development Block Grant, and a private commitment from a local lender. The Director of Community Development, with support from the Board of Appeals, successfully negotiated through the permitting process, the creation of affordable housing at the following luxury developments: Lumiere, St. Francis School, Modera Medford and River's Edge.

The installation of a lift at the historic Shepherd Brooks Estate was completed. \$24,450.50 was expended during Program Year 40. Removal of architectural barriers at the Medford High School community school pool and locker room was also completed. The pool and locker rooms are now operational. \$19,600.26 was expended during the past program year.

Improvements at Hickey and Morrison Parks, and Phase 3 improvements at Columbus Park were closed out. A total of \$22,426.59 was returned on retainage and punch list items were completed. 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. \$5,974.15 was spent during project close out.

Improvements to Magoun Park, benefiting a low to moderate income area, included new play structures, accessible pathways, benches, lighting and rehabilitation of the basketball courts. The project was funded with \$290,000 in leveraged state grant and City funds, in addition to \$297,437.00 in HUD funds.

The efforts of the Office also include planning and development activities associated with the provision of housing, expansion of businesses, transportation and the preservation and enrichment of open spaces. Major economic developments continued at River's Edge and Station Landing, including, the creation of affordable housing, parking and a hotel. The revitalization of Medford Square also continues. Design work on the building envelope and accessibility improvements at the Medford Senior Center nears

completion and will be bid out and constructed over the coming fall and winter. Additionally, the construction contract for the Krystle Campbell Peace Garden on the grounds of the Center has been awarded. Construction of this project is expected to begin this fall using a combination of federal, state, local and donated funds.. Phase I of the offices at River's Edge are 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. 262 new luxury apartments, with 2,500 sq. ft. of commercial space and 7,500 sq. ft. of restaurant space are under construction.

The final phase of construction on Cabot Road has begun construction. The project includes the construction of 297 units of luxury housing. Ten percent will be affordable.

General Questions

Program Year 5 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 \$1,439,772.00 in federal Community Development Block Grant funds for its fortieth program year (July 1, 2014 to June 30, 2015) as well as \$36,315.64 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 \$1,027,102.35 in CDBG funds during the reporting period. Additionally, the City accomplished a 94.09% 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 99.54% low and moderate benefit.

The City, in collaboration with the NSC, assisted one low income household to purchase their first home in an affordable resale. HOME administrative expenditures in the amount of \$10,194.12 supported the effort to assist with the resale and partnership with Medford Community Housing.

The City's objectives for the use of CDBG funds in 2014-2015 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 the creation of new affordable rental and homeownership opportunities in Medford, education and outreach, and increasing the number of Medford residents participating in homebuyer workshops.

Medford has been successful in negotiating the provision of 10% of deed restricted affordable housing in multi-family luxury housing developments, adding an anticipated mix of 62 rental and homeownership units to the City's affordable housing stock. The units have been financed 100% with private funds and have been secured as part of the permitting process.

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 established to implement the City's proposed housing activities and, increase 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 within 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 increase the supply of permanently affordable housing for low and moderate income households by negotiating

the creation of affordable units in luxury apartment developments that require approval by various City boards and supporting nonprofit housing programs. This can be used as a model by other communities with limited federal resources in a rapidly growing residential market.

Criterion Development Partners completed development of 163-unit luxury complex, Lumiere, creating 10% or 16 affordable units eligible for Department of Housing and Community Development's (DHCD), Local Action Unit Program. These units were marketed to households at or below 80% AMI. Rents are set based on 30% of 80% income limits, minus utility allowances, effectively less than High HOME rents. Affordable units included a mixture of studios, one-and two- bedroom units and were occupied beginning in winter 2015 following the December 2014 lottery.

The City also worked with MCREF, the developers of Modera Medford (formerly Medford Mews) and Criterion Development, developers of River's Edge 2, for the inclusion of another of 38 affordable and 6 middle-income rental units in their upcoming apartment complexes. Modera Medford, a 297-unit luxury apartment complex, will include 30 affordable rental units affordable to households at 80% of the AMI and a range of studio, one, two and three bedroom units. The second Rivers Edge development, a 282-unit luxury apartment complex, will include 8 units affordable to households at 80% AMI and 6 units affordable to households at 120% AMI. There will be a range of one and two bedroom units.

The City also continues to partner with nonprofit developers to increase affordable housing opportunities. Medford Community Housing, a Community Development Organization, purchased and renovated a two-bedroom condominium to create a newly restricted affordable housing opportunity for households at 60% of the AMI. The lottery was conducted in May 2015, with occupancy completed by June. The project was financed with NSC HOME funds, City of Medford CDBG, and private financing commitment from a local bank. Medford Community Housing continues to look ahead for additional redevelopment opportunities to transform existing properties into affordable restricted housing for low-to-moderate income households.

Objective #2 – Homeownership, Decent Housing

The City of Medford supported homeownership for low and moderate income households through the private development of affordable homeownership units and affordable resales. The North Suburban HOME Consortium's (NSC) First-time Homebuyers program traditionally provides \$7,500.00 - \$8,500.00 in downpayment and closing cost assistance for income-eligible first time homebuyers. While one eligible low to moderate income household opted out of this assistance during Year 5, they successfully purchased their first home in an affordable resale in coordination with the North Suburban Consortium.

Non-profit and affordable housing developer, Medford Community Housing, continued their First-time Homebuyers curriculum offering seven workshops throughout the program year. Approximately 100 households participated in these classes typically held at Medford Housing Authority. The organization also hosted a First Time Homebuyer’s Fair in conjunction with the North Suburban Consortium. The event enabled potential first-time homebuyers to meet with area lenders, attorneys, realtors and NSC representatives to learn about available programs and homeownership opportunities.

In addition, the City of Medford negotiated with private developer, Waypoint Development, to create 2 affordable homeownership units at the newly adapted 18-unit former St. Francis School in Medford. Two condominium units, a one-bedroom and a three-bedroom, will be affordable to households at 70% of the AMI under DHCD’s LAU Program. The lottery will be held in fall 2015, with occupancy expected in October. These two homeownership units are in addition to the 60 affordable rental units Medford gained through the Lumiere, Modera Medford and the new Rivers Edge luxury housing developments.

Accomplishments
Community Development Block Grant
Housing Objectives
Year 40

July 1, 2014 – June 30, 2015

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	CDBG \$50,000 HOME \$120,000	Proposed: Development of 2 units of permanently affordable rental housing. The City worked with Medford Community Housing to create one unit of restricted affordable housing. \$50,000 of CDBG was expended, leveraging \$120,000 in HOME financing. The unit was occupied during Summer of 2015.

<p><u>Privately Financed Housing Development</u></p>			<p>The City worked with Criterion Development to create 16 affordable rental units within the 163-unit luxury complex, Lumiere. New units were also negotiated with MCREF and Criterion Development in the anticipated Modera Medford and Rivers Edge 2 developments. The 297-unit Modera Medford will create 30 affordable units and the 282-unit Rivers Edge 2 will create 8 affordable units.</p>
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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>
<p><u>Downpayment Assistance:</u> Participate in North Suburban HOME Consortium ADDI-funded downpayment assistance program</p>		<p>No CDBG funds expended</p>	<p>Proposed: Assist 3 low- to moderate-income households with homeownership assistance. Actual: Assisted 1 new low- to moderate-income household in an affordable resale through the NSC.</p>
<p><u>First-time Homebuyer Workshops:</u> CHDO, Medford Community Housing, offers CHAPA certified first-time homebuyer classes.</p>		<p>No CDBG funds expended</p>	<p>Seven first time homebuyers workshops occurred in Medford, run by Medford Community Housing. 100 households participated in the workshops.</p>
<p><u>Privately Financed Housing Development</u></p>		<p>No CDBG funds expended</p>	<p>The City worked with Waypoint Development to create 2 affordable homeownership units within the redeveloped former St. Francis School.</p>

PHYSICAL IMPROVEMENTS TO CITY SYSTEMS AND PUBLIC FACILITIES

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

The City continued 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 and improve overall quality of life. Expenditures on Medford's physical improvement projects totaled \$595,244.61 in CDBG funds during the fortieth program year. A variety of activities were closed out and completed, while others are underway or substantially completed. Punch list items were finalized at Hickey, Morrison and Columbus Parks, Shephard Brooks Estate and the MHS Community Pool projects, while the City substantially completed reconstruction on Trout Avenue, Alexander Avenue and Eliot Streets and commenced work at Magoun Park and the Medford Senior Center.

Advancing Medford's progress on the City's aging roadway systems, reconstruction of Trout Avenue, Eliot Street and Phase 2 of Alexander Avenue was substantially completed during PY40. A total of \$217,195.21 was spent in CDBG funding during the last program year.

The City also continued to prioritize the removal of architectural barriers and accessibility improvements for disabled persons in neighborhood parks and public facilities. The City ensured completion of punch list items and released retainage for the Hickey and Morrison Park projects, expending \$22,426.59 over the course of the program year.

The installation of a handicapped accessible lift at the historic Shepherd Brooks Estate Manor was completed and \$24,450.50 was expended this program year. Removal of architectural barriers at the community school pool and locker room at Medford High School was also completed. A total of \$19,600.26 was expended during PY40.

Park reconstruction was finalized at Columbus Park, with punch list items completed and retainage released. The City also oversaw the completion of the Magoun Park project, spending \$297,437.00 in total. Improvements, benefiting a low to moderate income area, included new play structures, accessible pathways, benches, lighting and rehabilitation of the basketball courts. In total, \$319,863.59 was expended toward neighborhood park activities this past year.

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>
<p><u>Physical Improvements to City Systems and Public Facilities</u> Upgrade and replace street systems including water, sewer, drainage, streets, sidewalks, traffic signals, trees and landscape improvements.</p>	03K	CDBG \$231,330.26	<p>Proposed: Improve living conditions in designated low and moderate income neighborhoods.</p> <p>Outcome: Construction of roadway improvements on Alexander, Eliot and Trout Avenues was completed, improving quality of life for low- mod and disabled residents and promoting livable communities. Designs for envelope improvements and construction are underway to improve conditions at the Medford Senior Center.</p>
<p>Provide handicap access on sidewalks, crosswalks, parks and public buildings.</p>	03L	CDBG \$36,052.70	<p>Outcome: Removal of Architectural Barriers to parks and recreational facilities.</p> <p>Outcome: The City improved accessibility at the community school pool and locker room for low-mod and disabled residents. Retainage was also released on the Hickey and Morrison Parks projects,</p>
<p>Remove Architectural Barriers at the Shepherd Brooks Estate Manor historic property</p>	03	CDBG \$24,450.50	<p>Construction of the handicapped accessible lift was completed creating improved access for disabled residents.</p>
<p>Rehabilitation of Public and Recreational facilities.</p>	03F	CDBG \$303,411.15	<p>Reconstruction of Magoun Park that included installation of accessible play structures and pathways was completed, improving quality of life and recreational resources for low income neighborhoods and residents. Columbus Park was also closed out, releasing retainage and completing punch list items.</p>

The City's expenditures were consistent with proposed accomplishments anticipated for the 40th 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 development, "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. This project has been bid and is due to begin construction in Fall 2015. Additionally, plans for rehabilitation of the Medford Senior Center, which include the building envelope and accessibility improvements, are nearing completion and due for bidding and construction in fall/winter 2015/2016.

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.

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.

Reconstruction of the Cradock Bridge in Medford Square is currently being undertaken by MassDOT. This 3 year project will cause continued disruption and traffic congestion in Medford Square, which results in a challenge to economic development. The City will also work to mitigate the impacts of the

bridge, park and senior center construction through coordination with the Medford Chamber of Commerce and businesses in the square.

Citywide

Economic development activity with the City has increased in the past year. Fellsway Plaza has undergone a major exterior façade renovation, retenuing and expansion. This includes the upgrading of two abandoned parcels on Riverside Avenue to create 9000 Sq. Ft. of retail space to include 3 new restaurants. A new office and bank are being developed at 137 Main Street and a 26,429 Sq. Ft. Volkswagen dealership has been completed at 340 Mystic Avenue.

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 476. 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 under construction.

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. The 83,000 square foot hotel is under construction 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>Energy Conservation</u> Environmental Protection through use of strict standards in public and private development projects		No CDBG funds expended	Outcome: Energy was conserved and air and water quality improved through the appeals process and City monitoring of new developments by the Conservation Commission.
<u>Open Space Plan</u> Continue implementation of 7-year Open Space plan		The City expended \$363,914.35 on barrier removal and park improvements	Outcome: Continued improvements to and the expansion of City’s Open Space and recreation system, including Magoun Park, promote more suitable living environments and neighborhoods,.

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	18C	None in PY40	Outcome: Provided financial education and/or loans to 9 low/mod micro-enterprises to enable support of business expansion during

<u>Program/Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
owned micro-enterprise businesses			the Consolidated Planning period.
<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 \$215,965.80 for various public services. During the reporting period, \$200,866.72 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 and provides meaningful social and recreational activities for Medford seniors.

\$3,794.00 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 266 Medford residents were served, benefiting 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 also performs 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. Five severely disabled persons benefited from \$1,752.00 in CDBG funds.

The Medford Consumer Advisory Commission leveraged \$6,825.00 in CDBG funds with additional financial support provided 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 334 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) Social Worker, 4) 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 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. The Social Worker is crucial in aiding seniors to navigate issues with health insurance, SNAP benefits, Medicaid, Medicare, Social Security and housing concerns. A Volunteer Coordinator was also funded to maximize volunteer assistance to the programs. CDBG funds, of \$54,851.52 were expended to service approximately 975 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) \$4,551.91 in CDBG funds were leveraged with approximately \$64,000 in fundraised and private grant funding 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, martial arts, dances for participants aged 13-23, music therapy, and vocational camps were offered this program year. Arc also provided workshops, support groups, training, information and referrals to their clients and families. Seventy-four low to moderate income persons benefited from CDBG funding.

Immigrant Learning Center expended \$3,794.00 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 74 Medford residents, of which 44 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 \$3,794.00 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 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. Twenty-three 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. \$7,965.85 in CDBG funds assisted 12 Medford families, including 10 female headed households, by providing much needed quality afterschool care for families that otherwise could not afford it.

Mystic Valley Elder Services operated 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 \$4,567.44 in CDBG funds was expended, benefiting 14 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 26 individuals from 9 Medford households, 4 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 \$84,236.00 in CDBG funds, providing transportation services to 266 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. Activities include the senior lunch program 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. \$20,571.00 of CDBG funds were expended for the Elder Services Director, who oversees current programming that, benefited 78 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 40

July 1, 2014 – June 30, 2015

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	\$3,794.00 Funded 3,794.00 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 266 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 5 individuals and their families with specific care and supportive 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	\$6,830.00 Funded \$6,825.00 Expended	Provided 334 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 mediating 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	\$60,279.00 Funded \$54,851.52 Expended	Provided approx. 975 seniors with safety-related home maintenance services, nutritional shopping transportation, drop-in center transportation, social worker 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>	05O	\$4,552.00 Funded \$4,551.91 Expended	Provided 74 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	\$3,794.00 Funded \$3,794.00 Expended	Provided 23 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	\$3,794.00 Funded \$3,794.00 Expended	74 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	\$8,541.00 Funded \$7,965.85 Expended	12 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	\$8,195.00 Funded \$4,567.44 Expended	Provided medical transportation and day care rides to 14 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	\$1,167.00 Funded \$1,167.00 Expended	Provided emergency financial assistance and counseling to 26 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	\$84,236.00 Funded \$84,236.00 Expended	Provided 266 elderly, disabled and critically-ill 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	\$5,464.00 Funded \$0.00 Expended	Provided free legal advice and services to 83 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	\$20,571.00 Funded \$20,571.00 Expended	78 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 \$180,991.02 was expended on planning and administration, representing 12.26 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.

The Diversity Director meets with contractors bidding on public work to ensure compliance with Affirmative Action/ Equal Opportunity and Section 3 requirements.

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.

Barrier: To understand and update issues around Fair Housing and the needs of the community and impediments to fair housing

Actions: The Diversity Director held and participated in several meetings and forums to better address the issues

The diversity director convened individuals from the Banking Community, the

Local Housing Authority, and Real Estate Brokers to discuss issues they and local residents encounter. This resulted in looking at barriers of Section 8 and limited English issues and barriers.

The Diversity Director participated in a long term regional Fair Housing Caucus convened by Mass. Municipal Association (MMA), recipients of HUD funding. The task was to look at high and low areas of opportunity across the commonwealth and to review RFP's for local funding.

During June, the Diversity Director held a Fair Housing Training that was free and information was distributed across the region. She mailed over 700 flyers to multifamily homeowners in Medford, as well as local organizations and agencies. The event featured Metropolitan Boston Housing Partnership's Senior Advisor on Civil Rights and Fair Housing and highlighted state anti-discrimination laws and how they impact applicants, tenants and housing providers.

In addition, the Diversity Director participated in HUD's Section 3 webinar. She also updated the LAP and held a training for Department Heads and Boards and Commissions on limited English and disability issues.

Barrier: The issue of health disparities have come up at various times in meetings, discussions, and forums.

Actions: The Diversity Director met with the Health Director, the local Human Rights Commission (HRC), and a local coalition called Medford Health Matters (MHM).

The Diversity Director coordinated a community coalition meeting on health disparities and actions to address community needs. The decision was to focus on healthy foods, which are not always available to residents in poverty and often times immigrants do not understand how to cook healthy local foods they have never seen before. As a result of these meetings, Medford is now part of a monthly Mobile Food Market. Transportation is free and each month individuals receive 30 pounds of free healthy food by just signing up in advance. There have also been several free forums called 'Cooking Matters' aimed at teaching local immigrants how to understand nutrition, prepare and cook nutritious meals, and get a grocery bag of free food to take home. This program has been very successful and has assisted in friendships and weight loss.

Barrier: There are several types of impediments for persons with disabilities. There are housing issues, attitudinal issues, physical barriers, and policy issues.

Actions: To reach out to individuals with disabilities to ensure they understand their rights under fair housing laws regarding access in the City of Medford.

The Diversity Director meets with and trains all summer pool and pond staff on disability issues regarding physical barriers, equipment availability and service dogs. There was also new 'service dog' signage put up at the pond.

The Diversity Director collaborated with the Health Director and developed and mailed over 300 brochures to all city food establishments. This resulted from a couple of complaints about a lack of understanding about service dogs.

Working with the City Treasurer, they developed an HP pass for Wright's Pond usage. Until last year, the policy on passes was that they were only available as stickers on car windows. We developed a 'placard' type pass that an individual with a disability can transfer to any vehicle.

The Diversity Director completed the update to the City of Medford 504 Plan.

The Diversity Director worked to mediate a complaint at a Storage Unit Facility. A woman with a service dog for a hearing impairment was asked to remove her dog from the facility and not return. The owners premise was that the dog bothered the other storage unit owners. The Diversity Director met with the Animal Control Officer (who received the complaint), the woman, and the facility owner to explain the law, and develop and post service dog awareness for the facility.

She recently assisted a transgender individual in a wheelchair who was experiencing a barrier to a local food pantry in that the alternate accessible entrance was not working out. He was forgotten or assisted after all the other individuals. She contacted the food pantry to rectify this situation and create a policy for persons with disabilities.

The Diversity Director worked with local officials and residents to have the State redesign an intersection at a state road they designed that was dangerous and ineffective to persons with disabilities due to a guardrail that was blocking the curb ramp. After several meetings and a few months the crossing was redesigned and corrected to everyone's satisfaction.

She assisted a disabled woman who was being harassed by her neighbors as a result of her accessible van in the driveway. By contacting the landlord of the two-family, the situation was rectified.

She also assisted an elderly woman who requested a railing at the steps in the back of her condo complex. The management refused repeatedly. The Diversity Director contacted management and the owners and after several months of resistance, they complied and installed the railing.

She is assisting a woman with two disabled sons who moved into a new housing complex. She worked with the management and Fire Department to create an emergency evacuation plan, and is assisting her in getting an accommodation under the Fair Housing Act. The mother has requested automatic doors at the entrance due to her sons disability which entails a lack of upper body strength.

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.

The City has leveraged considerable state, federal, private and City funds for development in Medford Square. This includes a \$707,903.30 Federal Ferry Boat Discretionary grant to conduct a feasibility study for construction of a water taxi dock. The shuttle is proposed to serve Medford and surrounding communities and is expected to foster development in Medford Square as well as provide a recreational opportunity along the Mystic River.

Additionally, the City has leveraged a \$475,000.00 federal earmark with \$299,000 in State Park funds, \$354,375.00 in private funds and \$170,000.00 in City Linkage funds for the design and construction of the Clippership Linear Park (also known as the Krystle Campbell Peace Garden) on the grounds of the Medford Senior Center.

Furthermore, the City has leveraged a \$400,000.00 grant for the state Parc program for rehabilitation of McNally Park and \$200,000.00 for the State "Our Common Backyards" program for the reconstruction of Magoun Park.

NSC HOME funding has also benefitted affordable housing creation. Negotiations with for-profit developers have also resulted in the creation of new affordable housing opportunities 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 5 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 facilitated housing activities that increased the production of affordable units and resolved constituent 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 5 CAPER Citizen Participation response:

1. Public hearings for the City's Action Plan for this fortieth program year were held on March 6, 2014, April 9, 2014 and April 15, 2014. 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 \$1,439,772.00 in PY40 CDBG funds and \$36,315.64 in program income from repayment of housing loans. A total of \$1,027,102.35 was expended, including \$180,991.02, 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)**- Design is nearing completion to renovations to the Medford Senior Center and construction is anticipated for winter 2015/2016. The Center also received public service funding for senior programming. Removal of Architectural Barriers at the Community Schools Pool and Locker room were completed. \$33,735.31 was expended, representing 3.3% of Program Year expenditures.
- **Brooks Estates (Tract 3392)** - Funding of \$24,450.50 was expended toward the completion of a handicap lift to remove Architectural Barriers to the Shepherd Brooks Estate Manor. 2.3% of expenditures were made in this area.

- **South Medford (Tract 3396 and 3397)** –Reconstruction of Columbus Park was completed, with \$5,974.15 expended. Roadway work is underway at Alexander and Trout Avenues and Eliot Street. \$217,195.21 has been spent this year. Medford Community Housing also completed the acquisition and renovation of a two-bedroom affordable housing project at 297 Main St, expending \$50,000. Total neighborhood expenditures, amounting to \$273,169.36 representing 26.6% of total disbursements for this program year.
- **Wellington (Tract 339802)**
The Reconstruction of Magoun Park nears completion, expending \$297,437.00 throughout the program year. This represents 29.0% of total expenditures.
- **Glenwood/Haines Square/Fulton Heights (Tract 3399 & 3400)**
Removal of Architectural Barriers to Morrison and hickey parks nears completion with \$16,452.44 expended, representing 1.6% of total expenditures.
- **Citywide (as noted above)** – The balance of expenditures, \$200,866.72 or 20.0%, 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 5 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 5 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 ongoing training with regard to proper and timely reporting and invoicing and communications throughout the program year. Agencies submit a report with each invoice detailing the financial status of their individual award and provide quarterly reports with accomplishments and beneficiary data. Additionally, there have been frequent telephone and email communications 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 a daily basis by a clerk of the works or inspector on-site. 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 5 CAPER Lead-based Paint response:

In Year 5, The Affordable Housing Specialist provided homeowners Lead Paint information and referred residents to available rehabilitation programs.

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 5 CAPER Housing Needs response:

As a member community of the North Suburban HOME Consortium (NSC), Medford assisted one first-time homebuyer with the purchase of his first home in an affordable resale and promoted First Time Homebuyer Workshops held 6-7 times annually at the Medford Housing Authority. Approximately 100 families completed the first-time homebuyers training, hosted by Medford Community Housing.

The Housing Development Specialist also provided technical assistance to Medford Community Housing to explore future development and funding opportunities, including the acquisition and renovation of a two-bedroom unit along Main Street in Medford. The Specialist was also an active participant in the Tri-City Malden-Medford Continuum of Care (CoC).

The City managed rehabilitation loans for 21 households. Two of these loans provided monthly mortgage payments totaling \$3,215.64, while the other 19, totaling \$325,662.00, are deferred - due when the home transfers ownership. During Year 5, one deferred rehab loan in the amount of \$33,100.00 was paid-in-full.

Specific Housing Objectives

Program Year 5 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 5, Medford assisted one new household in the purchase of their first home through an affordable resale at the former Franklin School. The homebuyer, however, opted out of downpayment and closing cost assistance. In addition, approximately 100 households completed first-time homebuyers training conducted by Medford Community Housing, at the administrative offices of Medford Housing Authority.

Housing Results

Table 7: Housing Results

First-time homebuyers (HOME)						
Address	Amount	Number of Units	Household Size	Race/Ethnicity	Income	Elderly
68 Central Street		1	2	Asian	between 60-80 AMI	N
Total	\$0	1	2			

- 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.

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

The City of Medford is an active member of the Tri-City Continuum of Care (CoC), newly merged with the Massachusetts Balance of State. While the Tri-City CoC was made up of agencies and organizations serving and/or based in Medford, Malden and Everett, the Balance of State is managed by DHCD and comprised of a diverse range of agencies from 76 communities in the Commonwealth.

Prior to the 2015 merger, the Tri-City CoC was awarded in \$1,820,509 in McKinney Vento CoC 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 City also awards CDBG funding to area organizations serving the needs of elderly, critically-ill and disabled Medford individuals, including the

Salvation Army for the provision of emergency services to Medford families who need assistance in paying their rent, mortgage or utility payments and Medford Family Life assisting families in crisis with transitional housing and supportive services.

Newly constructed and upcoming housing developments are increasing the amount of affordable units accessible to individuals and families with disabilities. In the anticipated Modera Medford project, 10 out of 30 affordable units will be accessible; this includes one family sized, three-bedroom unit.

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 5 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 a new common floorinnd at Walkling Court, a basketball court at the LaPrise Village family site, pad mounted electrical transformers at the Willis Avenue family sire, new trash chute doors at 121 Riverside Avenue and an upgrade to a wireless 911 call system at all sites. The estimated cost for these projects is over \$500,000.00.

The MHA recognized the Public Housing Department hiring a new Director of Housing Programs and promoting two (2) employees to Public Housing Managers to better meet tenant needs. In addition, the 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 family services in the areas of physical and mental health care 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 5 CAPER Barriers to Affordable Housing response:

The MHA received a small grant from Medford Health Matters to hire a case manager to be assigned to the Walkling Court, state aided elderly housing site beginning on July 1, 2014. Over the past year a part-time, bi-lingual (Haitian Creole) case manager worked with tenants to both assess their needs and arrange for the delivery of services so they too can live more independently. Additional efforts included English as a Second Language classes, recreational activities and advocacy.

Finally, the housing authority received a small grant from DHCD to hire an architect to conduct a feasibility study for converting up to eight (8) existing units at the Ch. 667-1 Walkling Court state aided elderly site. That report has since been accepted and research is now underway to secure funding for the construction phase if possible.

The greatest barriers to affordable housing continue to be high housing costs and increased costs of living,. Housing costs within the City of Medford continue to exceed those of the majority of North Suburban Consortium member communities. According to the Warren Group, the median sales price was \$452,000 for a single-family home and \$372,000 for a condominium unit in Medford during July 2015. Obtaining homeownership is a struggle for a family of four earning the median area income at or below \$69,700 annually. Furthermore, the maximum purchase price limits set for first-time homebuyers participating in the NSC's downpayment and closing cost assistance program are increasingly limiting. According to the U.S. Department of Housing, the purchase price in Medford can't exceed \$361,000 for an existing single-family home and \$375,000 for a newly constructed single-family.

Due to the high cost of real estate in the City of Medford, acquiring viable properties is difficult. Medford Community Housing continues to work to acquire and develop property in Medford in spite of this, because this is their mission. Access to HOME and CDBG funding is absolutely essential in these projects. In the past program year they have completed the acquisition and renovation of a two-bedroom rental unit affordable to households at or below 60% AMI.

Medford Community Housing also performs outreach and hosts various events targeting realtors, bankers and interested homebuyers to provide information on available homeownership opportunities, mortgage products and programs. Over the past year, approximately 100 individuals participated in the 9-hour first-time homebuyers workshop.

The City negotiated for the inclusion of affordable rental and homeownership units in newly constructed, redeveloped and under construction developments by Criterion Development Partners, Waypoint Development

and MCREF Development. Lumiere, completed by Criterion Development Partners, is occupied, with 16 rental units affordable 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. Modera Medford by MCREF will create 30 additional affordable rental units and is anticipated for occupancy during late 2016. The Residence at One. St. Clare, formerly St. Francis School, nears completion with marketing for two homeownership opportunities currently underway. These efforts were completed with private funds and leverage limited federal and state grant financing.

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 5 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. While no households took advantage of these funds this past year, the City and NSC assisted one low-to-moderate income household purchase their first home in an affordable resale.

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 5 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 2014-2015 secured \$1,820,509 in McKinney-Vento Continuum of Care renewal funding for:

- Two permanent housing projects, providing 31 units of permanent supportive housing for homeless individuals and families and chronically homeless individuals (Homeless to Housing; Homeless to Housing Expansion),
- The newly approved Housing Now expansion will support 2 additional units of scattered-site permanent supportive housing for chronically homeless individuals.
- One transitional housing program for 8 homeless families (Medford Family Life),
- One transitional housing program for 11 homeless individuals (Kaszanek House),
- One permanent SRO housing program for homeless individuals (Washington Street),
- A supportive services program, the Tri-City Mobile Homeless Outreach Team, serving approximately 150 homeless individuals annually. A case management team provides basic services to stabilize homeless individuals and move them into shelter/housing.
- Stepping Stones and Stepping Stones Expansion—15 units of scattered site permanent housing with intensive case management for chronically homeless individuals,
- Disabled Family Leasing—13 units of permanent supported housing in three 3-bedroom apartments provide clinical case management for homeless families with a disabled head of household.
- The Tri-City Shelter + Care program, administered by the Malden Housing Authority and Heading Home, provides 10 permanent housing subsidies and clinical supports to formerly chronically homeless adults.

All the units above are eligible for Medford families and individuals who meet the criteria to live in those units. New bonus and planning funding provided some CoC support for HMIS services. The HMIS grant supports data

warehousing expenses to integrate data and produce an unduplicated CoC count. The Planning Grant will provide financial capacity to support a planner, CoC coordination efforts, program monitoring and establish a centralized/coordinated assessment system for homeless families and individuals.

Units that are physically located in Medford are:

- One transitional housing program for eight 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,
- 10 scattered site permanent supportive housing for families run by Housing Families, Inc., 7 of which are reserved specifically for disabled head of household families.
- 15 family scattered site shelter units 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).

In the 2014-2015 CoC NOFA, Heading Home was awarded new CoC project funding to support 2 additional units of Permanent Supportive Housing in the Tri-City Housing Now Expansion. Leveraging MRVP rental vouchers, the project will serve chronically homeless individuals within the Tri-City area and operate within the Housing First Framework.

The CoC also assists chronically homeless households in accessing mainstream resources such as housing authority units and Section 8 mobile vouchers, while 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 supportive 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 2014-2015 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	\$225,047	1		X		
Housing Families Inc.	Housing Families Inc.	Disabled Family Leasing-1	\$273,432	1		x		
Housing Families Inc.	Housing Families Inc.	Disabled Family Leasing-II		1		x		
Heading Home, Inc.	Heading Home, Inc.	Housing Now Expansion	\$35,928	1	X			
Heading Home, Inc.	Heading Home, Inc.	Homeless to Housing	\$554,357	1		x		
Heading Home, Inc.	Heading Home, Inc.	Medford Family Life	\$141,660	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	\$126,116	1		X		
Tri-City Community Action Program	Tri-City Community Action Program	Washington Street Residence	\$ 88,787	1		X		
Tri-City Community Action Program	Tri-City Community Action Program	CoC HMIS	\$ 6,420	1		X		
Tri-City Community Action Program	Tri-City Community Action Program	CoC Planning Project	\$ 22,343	1	X			
Total CoC Amount Received:			\$1,820,509					

Specific Homeless Prevention Elements

1. Identify actions taken to prevent homelessness.

Program Year 5 CAPER Specific Housing Prevention Elements response:

Medford has been 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 enabled the City to better understand local homelessness issues, solutions and to know best how to refer families who may come directly to City Hall for assistance.

The Office of Community Development has been actively involved in transitioning to the MA Balance of State CoC. Since the dissolve of Tri-Cap, it was important to understand the City-wide and regional implications of this shift and how Medford residents would be impacted. The merger will enable Medford and the other Tri-City communities to ensure efforts are closely aligned with the Massachusetts Plan to End Homelessness, which include the state’s goals of 1) increasing the number of permanently supportive housing units, 2) improving job readiness and achieving employment, 3) providing homeless prevention and rapid rehousing assistance, and 4) providing supportive case management to increase likelihood of residential stability.

Additionally, the City of Medford funds and collaborates with relevant nonprofit organizations that seek to prevent homelessness:

- The Pro Bono Legal Project, currently administered by Housing Families, 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,
- Bread of Life, in addition to providing meals, food pantry and basic essentials for vulnerable residents, also coordinated with other area service providers to connect those in need to other community-based programs and services.

The City's Housing Development Specialist was available to local residents for guidance regarding rent increases, evictions and housing searches and to connect residents to appropriate agencies for further assistance. She also coordinated with the Pro-Bono Assistance Program to assist tenants in preserving their tenancies when required. This was valuable to prevent loss of tenants' housing and stabilizing individuals and families.

Emergency Shelter Grants (ESG)

Program Year 5 CAPER ESG response:

While the City of Medford is not a recipient of ESG funds, the Malden/Medford CoC members, like Just-a-Start, applied to the MA Department of Housing and Community Development for Emergency Shelter Grants to be assist in combatting homelessness providing supportive services for displaced and homeless citizens and families. The funding serves very specific households housed in Malden, Medford or Everett who are below 30% MFI and in danger of becoming homeless.

COMMUNITY DEVELOPMENT

Community Development

Program Year 5 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 96.4% low- to moderate-income benefit, are broken down by income category as follows:

- Extremely low-income 5.0%,
- Low-income 81.6%,
- Moderate-income 9.8%.

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 City received \$36,315.64 in program income from \$3,215.64 in monthly mortgage payments and \$33,100 for repayment of a deferred loan.

- 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 \$27,552.49.

- 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 currently holds 19 deferred Housing Rehabilitation loans with a combined principal balance of \$325,662.00. One loan totaling \$33,100 was paid off during the program year. When originated, these deferred loans were given interest-free, with the principal balance due to the City upon 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 5 CAPER Antipoverty Strategy response:

In Year 5, 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 and public services programs such as food pantries, transitional housing, afterschool programs, childcare, legal aid and transportation,
- Creating affordable housing opportunities through continued partnerships with non-profit and for-profit housing developers
- 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,
- Involvement in the planning of the anticipated Green Line extension,
- Continued 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 5 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 5 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 5 CAPER Other Narrative response:

Financial Summary Reports

City of Medford
CDBG Expenditures-Year 40

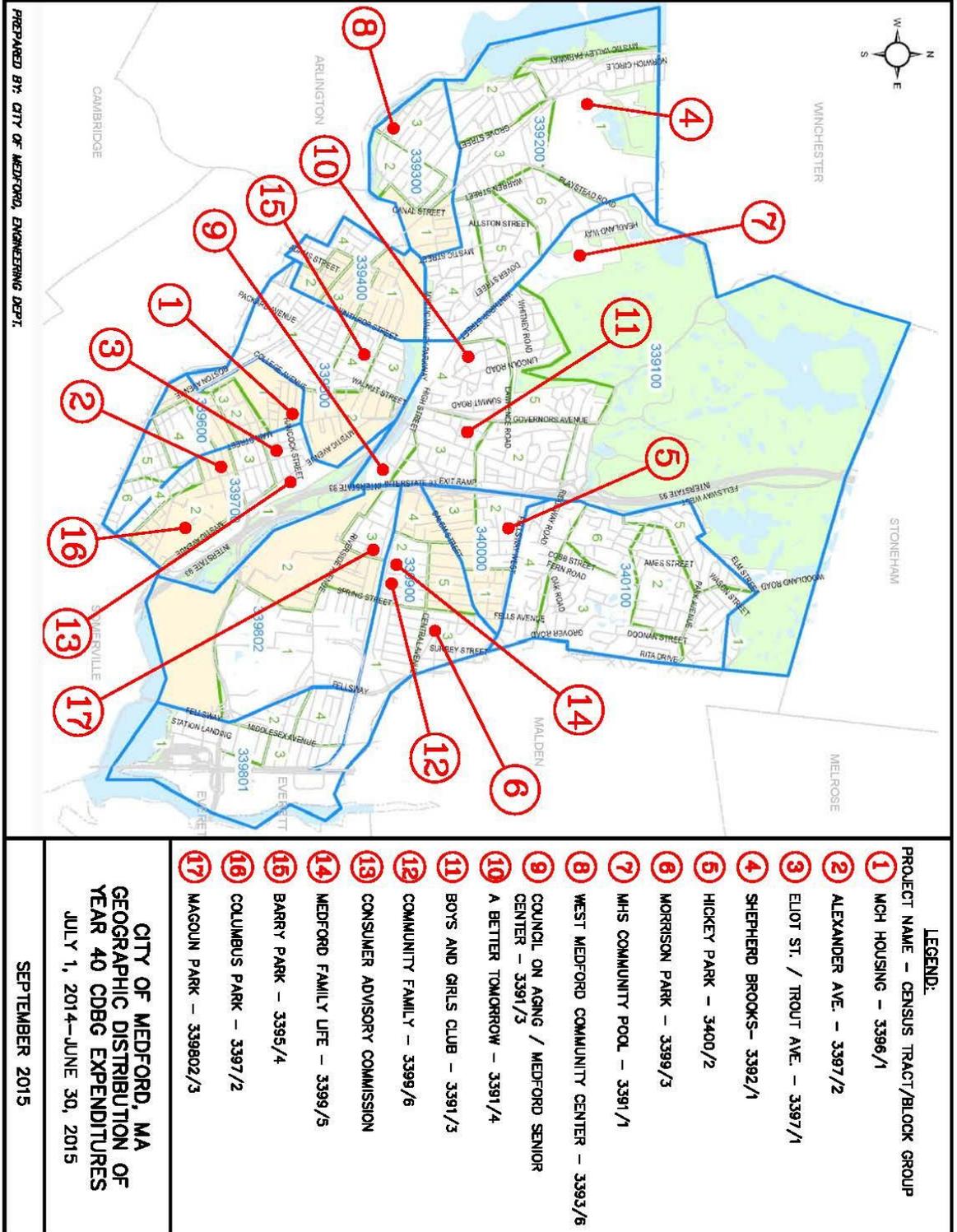
July 1, 2014 - June 30, 2015

<u>Activity#</u>	<u>Activity Name</u>	<u>Matrix Code</u>	<u>National Objective</u>	<u>Expenditures</u>
	Public Services	05-05W	LMC	\$ 200,866.72
2013-0005-787	Roadway Reconstruction – Alexander, Eliot, Trout	03K	LMA	\$ 217,195.21
2012-0021-766	Removal of Architectural Barriers - Shepherd Brooks Estate	03	LMC	\$ 24,450.50
2014-0003-803	Housing – 297 Main St.	14B	LMH	\$ 50,000.00
2012-0021-763	Removal of Architectural Barriers – Morrison & Hickey Parks	03F	LMC	\$ 16,452.44
2012-0021-764	Reconstruction – Columbus Park	03F	LMA	\$ 5,974.15
2012-0021-765	Removal of Architectural Barriers – Community Schools Pool & Locker Room	03	LMC	\$ 19,600.26
2014-0005-804	Reconstruction-Magoun Park	03F	LMA	\$ 297,437.00
2014-0004-806	Senior Center Improvements	03A	LMC	\$ 14,135.05
2014-0001-788	Planning & Administration	21A	N/A	\$ 180,991.02
	Total:			\$ 1,027,102.35

City of Medford**Public Services Expenditures-Year 40**
July 1, 2014 - June 30, 2015

<u>IDIS Activity #</u>	<u>Agency</u>	<u>Expenditures</u>
2014-0002-795	A Better Tomorrow Services	\$ 3,794.00
2014-0002-796	Arc of Eastern Middlesex	\$ 4,551.91
2014-0002-789	Boys & Girls Clubs	\$ 1,945.00
2014-0002-805	Bread of Life	\$ 1,052.00
2014-0002-790	Community Family	\$ 1,752.00
2014-0002-791	Consumer Advisory Commission	\$ 6,825.00
2014-0002-792	Council on Aging	\$ 54,581.52
2014-0002-797	Medford Family Life/Heading Home, Inc.	\$ 3,794.00
2014-0002-798	Immigrant Learning Center	\$ 3,794.00
2014-0002-799	Medford Public Schools (Early Childhood Afterschool)	\$ 7,965.85
2014-0002-800	Mystic Valley Elder Services	\$ 4,567.44
2014-0002-801	Salvation Army	\$ 1,167.00
2014-0002-794	SCM Transportation	\$ 84,236.00
2014-0002-802	Tri-CAP	\$ 0.00
2014-0002-793	West Medford Community Center	\$ 20,571.00
	Total:	\$ 200,866.72

Maps



PREPARED BY: CITY OF MEDFORD, ENGINEERING DEPT.

LEGEND:

- PROJECT NAME - CENSUS TRACT/BLOCK GROUP**
- 1 MCH HOUSING - 3396/1
 - 2 ALEXANDER AVE. - 3397/2
 - 3 ELIOT ST. / TROUT AVE. - 3397/1
 - 4 SHEPHERD BROOKS- 3392/1
 - 5 HICKEY PARK - 3400/2
 - 6 MORRISON PARK - 3399/3
 - 7 MHS COMMUNITY POOL - 3391/1
 - 8 WEST MEDFORD COMMUNITY CENTER - 3393/6
 - 9 COUNCIL ON AGING / MEDFORD SENIOR CENTER - 3391/3
 - 10 A BETTER TOMORROW - 3391/4
 - 11 BOYS AND GIRLS CLUB - 3391/3
 - 12 COMMUNITY FAMILY - 3399/6
 - 13 CONSUMER ADVISORY COMMISSION
 - 14 MEDFORD FAMILY LIFE - 3399/5
 - 15 BARRY PARK - 3395/4
 - 16 COLUMBUS PARK - 3397/2
 - 17 MAGOUIN PARK - 339802/3

**CITY OF MEDFORD, MA
GEOGRAPHIC DISTRIBUTION OF
YEAR 40 CDBG EXPENDITURES
JULY 1, 2014-JUNE 30, 2015**

SEPTEMBER 2015

