

PROGRAM YEAR 41
CONSOLIDATED ANNUAL
EVAULATION & PERFORMAMCE
REPORT (CAPER)
JULY 1, 2015 – JUNE 30, 2016



City of Medford, Massachusetts

Mayor Stephanie M. Burke
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Office of Community Development

Executive Summary

Program Year 41 CAPER Executive Summary response

As a direct Grantee of the US Department of Housing and Urban Development, the City of Medford is required to prepare and publically present a Consolidated Annual Plan Evaluation Report (CAPER). This CAPER provides an assessment of the City's progress on meeting those goals and objectives contained within Year 41 Annual Action Plan. The CAPER additionally details the use and distribution of funds during the period of July 1, 2015- June 30, 2016. Under the leadership of the Mayor, the Office of Community Development is charged with the administration of the federal Community Development Block Grant funds including the preparation of the CAPER.

HUD requires all Entitlement Communities to utilize the federal funds to further primary objectives that meet the needs of low and moderate income residents through the development of a suitable living environments, the provision of decent, safe, and sanitary housing and the creation of economic opportunities.

Within the Year 41 Annual Action Plan, the City identified activities and allocated funds within each of the three HUD objectives. Proposed projects furthered within the Year 41 Action Plan year included:

- Suitable Living Environments:
 - 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.
 - Public facility Improvements to the Medford Senior Center were completed
 - Public Infrastructure Improvements, specifically the removal of architectural barriers, were completed and design for a barrier removal project at Winthrop and South Streets was completed.
- Affordable Housing
 - Improvements to the Community Room at the Walkling Court Housing Development were completed
 - Creation of Homeownership Opportunities
- Economic Development

- Economic Development initiatives were furthered through the coordination of public and private partners.

The City of Medford has prepared this draft year-end report to provide public information on the annual accomplishments and expenditures. The draft plan was published and posted on the City's website, www.medfordma.org on September 23, 2016. Public comment will be accepted for 14 days prior to submission of the final report to HUD.

CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan.

91.520(a)

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

During the program year the City of Medford expended \$1,933,362.00 to address the community needs identified in the five-year Strategic Plan and the Year 41 Annual Action Plan. Major initiatives furthered in the Year 41 include:

- Public facility improvements: most notably improvements to the Medford Senior Center. Improvements included the replacement of the roof, window and storefront replacement to create energy efficiency, masonry repairs, installation of a lift to make the stage accessible, and HVAC improvements. CDBG funds in the amount of \$1,365,381.15 were leveraged with approximately \$1,500,000.00 in federal and state grants, as well as private donations to entirely renovate the grounds of the Senior Center to create the Krystal Campbell Peace Garden.
- Removal of architectural barriers: the design work for the improvements at South and Winthrop Street was completed.
- Improvements to Community Room of an Affordable Housing project: The Medford Housing Authority received \$10,451.20 in CDBG funds to replace the air conditioning at Walkling Court Housing Development.
- Affordable housing: Medford Community Housing, a non-profit Community Development Organization, purchased and upgraded a two family house. Financing through NSC HOME funds, the City of Medford Community Development Block Grant, and private financing from a local bank made the project possible. The affordable housing lottery is underway.
- Public Services: Funds were provided to non-profit service agencies to provide 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. A total of \$197,037.92 was expended with Human Service Agencies to provide essential services.

Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)

As the following chart illustrates, the City was able to meet or exceed the Year 41 Program year goals. The only exception is within the Economic Development area. The City had proposed 10 jobs created/retained. While that very aggressive goal was not achieved, the City did make significant progress in the coordination of an economic development strategy for Medford Square, the Riverside Industrial Area as well as River’s Edge. Additionally a city funded Economic Development Planner position will be added to the Office of Community Development. Job creation and retention using nonfederal funding sources is possible due to the healthy economy and the proximity of Medford to Boston. These efforts are ongoing and will result in the achievement of the five year Strategic goals.

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected 5 Year Strategic Plan	5 Year Actuals-to Date	5 year Plan Percent Complete	Expected Annual Program Year	Actual – Annual Program Year	Percent Complete
Administration and Planning	Planning and Administration	CDBG: \$167,468.45	Other	Other	NA	NA	NA	NA	NA	NA
Affordable Housing	Affordable Housing	CDBG: \$150,000	Rental units rehabilitated	Household Housing Unit	5	2	40.00%	1	2	200.00%
Economic Development	Economic Development	CDBG: \$0.00	Jobs created/retained	Jobs	10	0	0.00%	10	0	0.00%
Public Facilities, Infrastructure, and Parks	Non-Housing Community Development	CDBG: \$1,184,611.53	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	15000	7945	52.97%	4000	7945	198.63%

Public Facilities, Infrastructure, and Parks	Non-Housing Community Development	CDBG: \$10,451.20	Rental units rehabilitated	Household Housing Unit	142	142	100%	142	142	100%
Public Service	Non-Homeless Special Needs	CDBG: \$197,037.92	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	4000	3472	86.80%	800	3472	434.00%
Public Service	Non-Homeless Special Needs	CDBG: \$3,778.00	Homeless Person Overnight Shelter	Persons Assisted	100	23	23	20	23	115%

Table 1 - Accomplishments – Program Year & Strategic Plan to Date

Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.

The City of Medford received \$1,433,774 in Community Development Block Grant (CDBG) funds and \$3,215.68 in Program Income, during the forty-first program year. Prior year funding commitments were also expended to further activities in this program year. Of the \$1,725,590.10 in CDBG funds expended between July 1, 2015- June 30, 2016, 89.7% benefitted low and moderate income persons. This low-moderate benefit far exceeded HUD’s requirement of 70%. The CDBG priorities, accomplishment and use of funds is as follows:

PHYSICAL IMPROVEMENTS

The City allocated approximately 63% of its entitlement funding towards Physical Improvements to City Systems and Public Facilities and expended a total \$184,751.20 between July 1, 2015 – June 30, 2016. There were city wide updates to water, sewer, sidewalk, drainage, and street systems as well as upgrades to parks and facilities. \$24,300 was expended in the removal of architectural barriers at the intersection of South Street and Winthrop Street. The Medford Housing Authority received \$10,451.20 from the City to replace the air conditioning in the community building at Walkling Court. Improvements at the Medford Senior Center continued with roof replacement, HVAC upgrades, exterior improvements, interior upgrades, and landscaping expending \$1,365,381.15 in 2015. It is estimated that 4,000 low to moderate income persons have benefited from these physical improvements in the forty-first program year.

ECONOMIC DEVELOPMENT

24 CFR 570.201(c)/570.208(b)

With general government funding, the City has created a business liaison position to increase communication between the State and local businesses in Medford Square impacted by the bridge replacement project and to improve communication between City Hall and business persons and assist new businesses. One outcome will be the development of a Medford Business Guide.

Additionally, the Mayor's Business and Economic Development Committee have completed a six- month community engagement process to understand economic development needs in the city's established business districts and squares and have produced a report with recommendations regarding the City's economic future.

The City's Office of Community Development is working with the Metropolitan Area Planning Council to prepare and implement a Master Plan for Medford Square to guide economic development and physical improvements in the Square. When completed the Medford Square Master Plan will include a set of goals and strategies that are focused on immediate revitalization actions. The major area of focus will include economic development and vitality, land use and sense of place, transportation and connectivity and open space and quality of life. The study, which is scheduled for completion in Summer 2017 is funded with \$90,000 in leveraged District Local Technical Assistance and funding from the Barr Foundation. The newly funded Economic Development Planner position in the Office of Community Development will oversee the implementation of the economic development strategy. The City is working on

plans for redevelopment of Riverside Plaza, to be a central focal point in the Square. The City has applied for \$250,000 in Federal Land and Water Conservation Funds, which will be matched with City funds for the design and development of this project. Additionally, the City has leveraged \$1.5 million dollars for the construction of the Krystle Campbell Peace Garden adjacent to the Senior Center on Riverside Avenue. The project, which is nearing completion, will draw people into the square, in addition to providing a place of quiet repose for many downtown workers and senior citizens living in the vicinity and using the senior center.

The City has experienced an unprecedented interest in residential, commercial and retail growth. City staff have worked with potential developers on projects ranging from single family, restaurant, retail and luxury apartment development on a daily basis. This had been fueled by the proposed Green Line Extension, as well relative affordability, proximity to Boston and quality of living ensure the attractiveness of Medford as a location to live, work and do business in this vibrant economy.

Station Landing, the first award winning “Massachusetts Smart Growth” mixed-use, master planned development has completed its final phase with the opening of a boutique style Marriott AC hotel. The River’s Edge Project which is a 215-acre redevelopment site being developed by Preotle Lane along the Malden River in the Cities of Medford, Malden and Everett, is nearing buildout in Medford with the construction of a 4 story building including 262 luxury apartments, 2,500 square feet of commercial and 7,000 square feet of restaurant space currently in progress. Nearby at 5 Cabot Road an additional 297 residential units with amenities are under construction. A transit oriented development containing 42 units of housing and approximately 2000 square feet of commercial space is under construction at 570 Boston Avenue and 200 residential units have been permitted on Middlesex Avenue, as well as 490 units including small commercial space on Locust Street.

Renovation and expansion of the Fellsway Plaza to include a Gym and three new restaurants has been completed increasing employment opportunities and tax growth.

A major redevelopment of the Meadow Glen Mall on Locust Street has recently been permitted. This is a 300,000 square foot shopping center anchored by Kohl’s and Marshalls. Renovations will transform the original enclosed mall into one of the area’s premier power centers. New tenants will include Wegmans, Pet Smart and Dick’s Sporting Goods. Exterior upgrades will include new storefront facades throughout, a complete renovation of the parking areas including lighting and landscaping and all exterior signage.

Smaller businesses are also thriving in Medford, particularly new restaurants. In the past year Real Gusto, an upscale Italian eatery opened on High Street in Medford Square, and the Chicken and Rice Guys, a restaurant and food truck operation commenced business on Salem Street.

Riverside Avenue will soon be home to a new Indian restaurant, and expanded Tenoch Mexican eatery and a third new restaurant in the premises of the former Medford Diner. The Hillside district, near Tufts University will also boast two new restaurants at 570 and 572 Boston Avenue.

Businesses in the health service industry are also growing with the recent arrival of and Urgent Care Facility at 616 Fellsway and the expansion of the Dialysis Center at 340 Mystic Avenue.

New commercial and industrial developments include a specialty wood supplier at 475 Riverside Avenue, new commercial storage facility at 25 Commercial Street, a 21,000 square foot office and bank building at 137 Main Street and the relocation and expansion of Bianco Sausage from the City of Everett to the site of the former Hoff's Bakery Facility on Sixth Street in Medford.

In order to further support and encourage economic development in Medford, the City entered into and Community Compact Agreement with Commonwealth of Massachusetts. This allows the City to access District Local Technical Assistance for Housing and Economic Development, in addition to additional state assistance in creating a Complete Streets Program and updating the City's financial system.

In 2015 the City applied for and was granted Economically Distressed Area (EDA) Designation for the entire area of the city. This will facilitate brownfields redevelopment projects within EDA as it will permit them to access state financial incentives such as the Brownfields Redevelopment Fund or the Massachusetts Brownfields Tax Credit. Ideally, this will encourage reuse of previously unavailable land and subsequent economic development activity.

HOUSING

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

During the July 1, 2015- June 30, 2016 program year, the City's housing activities included efforts to increase affordable housing opportunities for low and moderate income households, fund developer-driven projects and assist first time homebuyers.

The City awarded \$150,000 in CDBG funds to non-profit developer Medford Community Housing to facilitate the creation of affordable housing. These funds were leveraged by \$447,966 in HOME funds and \$110,000 in private financing. Medford Community Housing acquired the property in May 2016 and is in the process of completing renovations. The project will culminate in the addition of two rental units affordable to families at 60% AMI with occupancy anticipated during Fall of 2016.

Medford also assisted two low-to-moderate income households through the NSC's First Time Homebuyer Program. \$12,000 in HOME funds provided down payment and closing cost assistance to income-eligible households purchasing the two affordable condominium units at the newly renovated Residence at One St. Clare. The units were occupied in December 2015, following the affordable housing lottery.

Additionally, 47 affordable units have been added through the City of Medford's permitting process. The City continues to negotiate with private-developers for the inclusion of 10% affordable units in new developments seeking zoning relief. Staff time and resources leverage these activities and supplement our affordable housing goals and objectives. The Residences at One St. Clare, the former St. Francis School, resulted in two affordable homeownership opportunities. Closings took place in December 2015, with both homebuyers receiving NSC down payment assistance. One rental unit has been completed at the former Sons of Italy, located at 42 Alfred Street. The lottery is set to begin soon, with occupancy anticipated in the fall. Modera Medford is producing thirty affordable units, which are expected to be complete and ready for occupancy by the end of 2016. Fourteen affordable units at Rivers Edge, which include a combination of eight low and six moderate income units, is also under construction.

Other housing activities included the promotion of down payment assistance, participation in Medford Community Housing's First Time homebuyer Workshops, continued membership in the North Suburban Consortium and constituent referrals to agencies assisting with housing issues and crisis prevention.

PUBLIC SERVICES

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

Suitable Living Environment

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

The City sought to provide a variety of public service programs and continued to support nonprofit community development agencies to encourage the development of affordable housing. The City allocated \$215,066.00 for various public service agencies to provide these public service programs. During the reporting period, \$213,058.92 was expended.

The City's objectives included: combating social illnesses, public safety and substance abuse, which each weaken the stability of the City's households and neighborhoods; improving quality

of life for Medford’s school children, through the provision of after school 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 emotionally disabled population; improving quality of life for Medford’s elderly population, through the provision of day health and recreational programs and transportation to reduce isolation; encouraging the creation of affordable housing and assisting those with emergency and transitional housing needs with programs such as legal aid, food pantry and meals, and referral and counseling services; and providing vocational, social, recreational and educational opportunities for developmentally disabled Medford residents and their families.

The City also received \$459,966.00 in HOME funding as part of its membership in the North Suburban Consortium. The Consortium is charged with overseeing the implementation of the North Suburban regional affordable housing strategy and is comprised of eight communities, including Malden, Medford, Arlington, Chelsea, Revere, Melrose, Everett and Winthrop.

CR-10 - Racial and Ethnic composition of families assisted

Describe the families assisted (including the racial and ethnic status of families assisted).

91.520(a)

	CDBG
White	15,381
Black or African American	1,826
Asian	1,317
American Indian or American Native	36
Native Hawaiian or Other Pacific Islander	1
Total	18,561
Hispanic	491
Not Hispanic	18,070

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

Narrative

The analysis of households served demonstrates that the City and its community-based

partners are serving a diverse population. Across all races the City's CDBG programs and projects are serving households consistent with their representation in Medford.

DRAFT

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available during 5 year period	Amount Expended During Program Year
CDBG	Entitlement funds	5,735,096	\$1,933,362

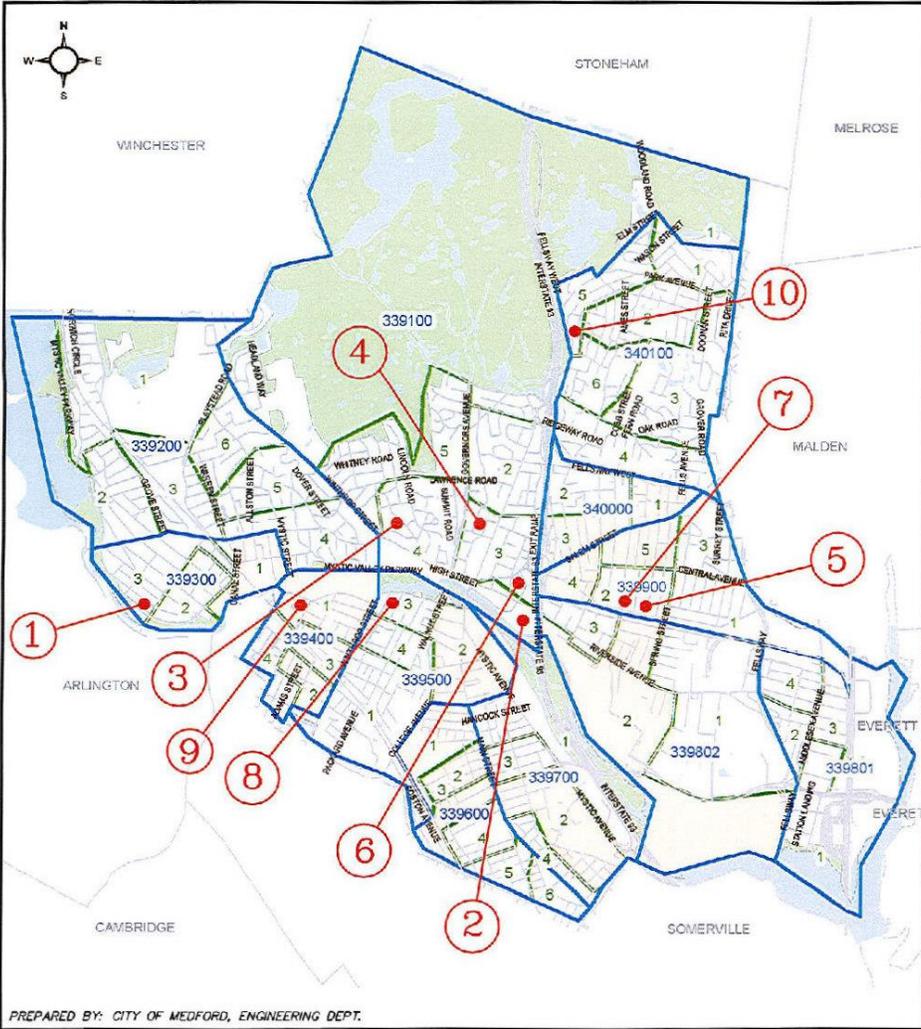
Table 3 – Resources Made Available

Narrative

During the program year, the City expended \$1,933,362, which consisted of Entitlement funds of \$1,433,774, program income of \$3,215.68, and prior year funds of \$496,373. The prior year funds had been committed to public facilities and infrastructure projects that were able to be completed in the Year 41 Action Plan.

Identify the geographic distribution and location of investments

Project priorities are developed based on identified needs rather than allocating investments to a particular area or neighborhood. Priority projects included ongoing improvements at the Medford Senior Center and Designs for the Removal of Architectural Barriers at the Intersection of South and Winthrop Streets. The following map details the location of CDBG investments and programs.



- LEGEND:**
PROJECT NAME – CENSUS TRACT/BLOCK GROUP
- ① WEST MEDFORD COMMUNITY CENTER – 3393/6
 - ② COUNCIL ON AGING / MEDFORD SENIOR CENTER – 3391/3
 - ③ A BETTER TOMORROW – 3391/4
 - ④ BOYS AND GIRLS CLUB – 3391/3
 - ⑤ COMMUNITY FAMILY – 3399/6
 - ⑥ CONSUMER ADVISORY COMMISSION
 - ⑦ MEDFORD FAMILY LIFE – 3399/5
 - ⑧ SOUTH ST. / WINTHROP ST. – 3395/3
 - ⑨ WALKING COURT – 3394/1
 - ⑩ MCH FELLSWAY WEST – 3401/5

CITY OF MEDFORD, MA
GEOGRAPHIC DISTRIBUTION OF
YEAR 41 CDBG EXPENDITURES
JULY 1, 2015–JUNE 30, 2016

SEPTEMBER 2016

PREPARED BY: CITY OF MEDFORD, ENGINEERING DEPT.

Leveraging

Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.

CDBG funds to leverage significant public and private resources. Public resources from national, state, and local funders, private foundations, the United Way, fundraising and local donations in excess of \$500,000 were leveraged by the City's public service agencies.

Approximately \$1,500,000 of federal, state and private funds were utilized to fund the renovations at the grounds of the Medford Senior Center to create the Krystle Campbell Peace Garden.

The Metropolitan Area Planning Council's District Local Technical Assistance (DLTA) funds awarded \$90,000 to the City. DLTA funding will help promote economic development and pursue revitalization efforts in Medford Square through research and stakeholder engagement.

The City's General Funds provided resources for activities including Public Parks, Facilities, and Infrastructure, the Fair Housing Office and the Disability Commission. Furthermore, Balance of State Continuum of Care (CoC) funds awarded assisted in the housing and services to homeless persons furthering the City's goals and objectives

North Suburban Consortium (NSC) HOME tracks leveraged funds and match under the HOME program. The NSC has included a HOME match report within its CAPER.

CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of homeless households to be provided affordable housing units	0	0
Number of non-homeless households to be provided affordable housing units	2	4
Number of special-needs households to be provided affordable housing units	0	0
Total	2	4

Table 4- Number of Households

	One-Year Goal	Actual
Number of households supported through rental assistance	0	0
Number of households supported through the production of new units	1	2
Number of households supported through the rehab of existing units	0	0
Number of households supported through the acquisition of existing units	1	2
Total	2	4

Table 5 - Number of Households Supported

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

Efforts to increase affordable housing opportunities, fund developer-driven projects and assist First Time Homebuyers have exceeded anticipated outcomes during the 41st program year. The City served four low-to-moderate households, coordinating with the North Suburban HOME Consortium (NSC) to provide down payment assistance and fund the production of two affordable rental units.

The City and the NSC collaborated to fund an affordable housing project undertaken by Medford Community Housing. The project will culminate in the addition of two new affordable rental units to the City's housing stock and utilizes \$447,966 in HOME funds, \$150,000 in CDBG funds and \$110,000 in private financing. Medford Community Housing acquired the two-family property located at 705-707 Fellsway West in March of 2016. The Fellsway property is currently undergoing renovations with occupancy anticipated for Fall of 2016. The two-bedroom and three-bedroom rental units will be affordable to families at 60% AMI over a period of 30 years.

In addition, \$12,000 in HOME funds provided down payment and closing cost assistance to two households acquiring the two affordable condominium units at the newly renovated Residence at One St. Clare. The units were occupied in December 2015, following an affordable housing lottery.

Limited funding generally presents the largest challenge in the implementation of goals and objectives, with needs far outweighing available resources. Consequently, the affordable housing opportunities created through Medford's permitting process, continue to provide the greatest supplement to federal funds. Private developments seeking zoning relief are required to set aside 10% affordable units. A total of 47 units have been added to the City's housing stock and are in various stages of completion. Two affordable homeownership units at the Residence at One St. Clare were sold and occupied during December 2015; forty-five affordable rental units have also been incorporated in the Modera Medford, Rivers Edge II and 42 Alfred Street developments. Modera Medford and Rivers Edge II are currently under construction, while 42 Alfred Street nears the lottery and lease-up phase.

Discuss how these outcomes will impact future annual action plans.

The expansion of affordable housing will remain a critical priority for the City throughout the duration of the strategic plan. The progress in expanding safe, decent affordable housing in Medford speaks to the City's commitment in addressing the affordability crisis and housing needs among low-to-moderate income residents. Over the past year the City and North Suburban Consortium have substantially invested CDBG and HOME funds toward affordable

housing production and assisting CHDO Medford Community Housing to build capacity.

The City will build on its successes by continuing to access HOME funds for locally supported affordable housing projects, investigating opportunities to develop housing programs aimed at preserving the current housing stock, strengthening community partnerships, seeking alternative resources, such as funds from the recently enacted Community Preservation Act, and utilizing Medford’s permitting process to negotiate the inclusion of affordable units in private developments.

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

Number of Persons Served	CDBG Actual
Extremely Low-income	0
Low-income	2
Moderate-income	2
Total	2

Table 6 – Number of Persons Served

Narrative Information

The City will continue to leverage its partnership with the North Suburban Consortium, a membership organization of 8 surrounding local communities, as part of regional efforts to identify and create affordable rental and homeownership opportunities, establish housing priorities and advantageously allocating federal resources.

In addition, strong project coordination, monitoring of expiring-use properties and participation in the state’s Local Action Unit Program assist in ensuring long-term affordability further supporting affordable housing goals and offsetting diminishing federal resources.

CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)

Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The Balance of State (BoS), under the Department of Housing and Community Development, implements the Continuum of Care homelessness strategy across 76 member communities. The continuum is comprised of representatives from the Department of Public Health, DHCD, various communities, human service agencies and shelter and housing providers. The Malden/Medford Continuum of Care (CoC) merged with the Massachusetts Balance of State last year in order to preserve the Tri-City's ability to address homelessness and engage in implementation closely aligned with the Massachusetts Plan to End Homelessness. This encompasses the administration of Federal and State resources, coordination with service providers, regional needs assessments and overseeing project execution addressing homelessness assistance and prevention. The State's goals are 1. increasing the number of permanently supportive housing units; 2. improving job readiness and achieving employments; 3. providing homeless prevention and rapid rehousing assistance; and 4. providing case management services to increase the likelihood of residential stability.

In the past year, the Balance of State began the process of establishing and phasing in a Centralized / Coordinated Assessment system. This process, also referred to as Coordinated Entry, aims to allocate assistance as effectively as possible, improve coordination, avoid duplication of services, assess and prioritize based on vulnerability, while identifying service gaps and potential resources. All individuals identifying as homeless are assessed, regardless of initial residency, by outreach workers and shelter providers. From there, Coordinated Entry staff connect each individual to the appropriate services based on the information provided in the centralized intake.

Regional needs assessments were also conducted by the Balance of State to determine service gaps and priorities across member communities. The process engaged service providers and stakeholders in four areas: Framingham, Lawrence, Metro North and Norfolk. Identified gaps and needs included: overnight shelter, day centers, permanent supportive housing for victims of domestic violence and housing for LGBTQ individuals and those suffering with severe issues, such as substance abuse. The assessments, currently in a draft stage are being finalized and will inform future goals and priorities.

Additionally, ABCD's Mystic Valley Opportunity Center oversees the Mobile Homeless Outreach Unit (MHOT). The Mobile Homeless Outreach Unit, serving Medford, Malden and Everett, Chelsea and Revere conducts regular street outreach, visiting frequented high-traffic areas to meet and engage individuals on site. Individuals are provided with a safety kit, which includes such items as toiletries, and are invited to ABCD's offices in Malden to complete a full assessment and begin the process of connecting at-risk persons to shelter and other assorted community resources. The unit works with Medford Police Department on an as-needed basis to ensure public safety and move homeless individuals from uninhabitable environments into safer living conditions. Since ABCD's implementation in February, 15 individuals have been assisted with housing applications and 5 have been placed into detox facilities.

Addressing the emergency shelter and transitional housing needs of homeless persons

Consistent with HUD's Strategic Plan and goal of preventing and ending homelessness, the Balance of State has prioritized permanent supportive housing. In anticipation of the 2016 NOFA, Heading Home has opted to reallocate the share of HUD CoC funding traditionally requested for the Medford Family Life Education Center toward the creation of new, scattered-site permanent housing within the Tri-City area.

Being the only remaining transitional housing facility within the Tri-City region, this community resource becomes increasingly critical. Recognizing the importance of Medford Family Life, the City and Heading Home deliberated on alternative plans for its continued operation. Consequently, Heading Home has agreed to increase the allocation of privately fundraised monies toward the facility and its programming.

The Medford Family Life Educational Center has been a successful and long-standing program, providing supportive transitional housing for up to 8 single-parent families at a time, along with a range of services that include case management, economic mobility programming, community referrals and assistance in securing permanent housing. While not a recipient of ESG, the City of Medford provides continued support through CDBG.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

CDBG public service sub recipients Housing Families and Salvation Army provide a variety of programming designed to prevent homelessness. Housing Families' Pro-Bono Legal Team offer low-income households with legal advice, representation, advocacy, outreach and information. Services primarily focus on housing, eviction and civil cases threatening a household's sustainability. Families served also receive access to service referrals, direct financial assistance and comprehensive support services provided by other agency departments. Salvation Army offers an emergency services program that provides families in crisis with rental assistance, utility assistance and other assorted basic needs. Starting in Program Year 42, Salvation Army will begin an initiative targeting repeat recipients and providing long-term case management to move families beyond crisis and into increased stability.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

As mentioned above, the Balance of State focused efforts to phase in Coordinated Entry, designed to identify and efficiently facilitate the admission of vulnerable, at-risk persons into permanent supportive housing. The process is working, with the phasing of Permanent Supportive Housing complete and Rapid Rehousing and Homelessness Prevention left to launch. Between July 1, 2015 – June 30, 2016, Coordinated Entry has assisted in placing 32 new homeless individuals within the Tri-Cities in Permanent Supportive Housing.

The Continuum of Care has made strides in ending veteran homelessness within the Balance of State service area, achieving 3 out of 4 critical benchmarks. These benchmarks include 1) ending chronic homelessness for veterans, 2) having sufficient permanent housing capacity and 3) community commitment to adopting the housing first model. The Balance of State continues to work toward achieving the 4th benchmark to reduce shelter-stays and the period of time veterans experience homelessness and provide quicker access to Permanent Supportive Housing.

Additionally, the Balance of State also plans to request funds for a new project in the 2016 CoC NOFA that will Rapidly Rehouse homeless individuals through ABCD's Mobile Homeless Outreach Unit.

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

Actions taken to address the needs of public housing

The MHA continued its efforts to improve the public housing stock within its portfolio. Projects started or completed in the past year include completion of a fire alarm upgrade at four (4) federal elderly sites, a water infiltration remediation project at two (2) federal elderly sites, a sewer ejection pump project at Tempone Apartments, a roof replacement project at the LaPrise Village family site, and new roof canopies at the Walkling Court state elderly site. Projects in design include an elevator upgrade at Weldon Gardens, lobby improvements at the Saltonstall Building, interior improvements at the state Ch. 689 Special Needs housing and conversion of up to eight (8) units to full wheelchair accessibility at the Walkling Court site. The estimated costs of completed projects exceeded \$1.5 million and new design work estimated in excess of \$1.35 million. The housing authority received \$951,004 in new federal capital funds for 2016 to be earmarked for additional projects.

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

The Housing Authority 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 and continuing through June 30, 2016. Over this period 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. Additionally the housing authority fully utilized its federal ROSS and Family Self Sufficiency (FSS) grants to assist tenants arrange needed services, become financially self-sufficient and to explore home ownership opportunities. Currently, three (3) Section 8 families participate in the Home Ownership Program. The MHA also regularly hosts first time home ownership workshops in one of its community rooms to assist Medford residents. The Resident Services Department has three (3) full time employees dedicated to assisting tenants and program participants with various needs.

Actions taken to provide assistance to troubled PHAs

Not applicable

CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)

Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)

High development costs combined with little developable land, outdated infrastructure and limited resources, present significant challenges to providing affordable housing. The City is engaged in practices and activities designed to alleviate these barriers.

Medford has been successful in working with developers through the local permitting process to set aside 10% of housing units as affordable in private developments. Ongoing efforts are part of the Department of Housing and Community Development's Local Initiative Program (LIP), regulated under Chapter 40B, providing communities the flexibility to proactively address the creation of low-to-moderate income housing, while maintaining long-term affordability. Chapter 40B is a statute under Massachusetts General Laws requiring that municipalities achieve 10% of their local housing stock as affordable for households at or below 80% of the Area Median Income (AMI). The City will continue to participate in LIP, leveraging available resources and technical assistance to preserve and expand Medford's affordable housing stock in compliance with the Commonwealth's goals and objectives.

Additionally, the City has been reviewing inclusionary zoning practices, strengthening community partnerships and collaborative efforts, working with private for-profit and non-profit developers to facilitate affordable housing creation, encouraging infill development and reuse, affirmatively marketing affordable housing opportunities to provide fair and equitable access to all, providing technical assistance and relief through Medford's permitting processes, investing in public infrastructure, financing eligible affordable housing projects with federal HOME and CDBG funds and promoting participation in First Time Home Buyer Trainings and Programming.

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

Medford's membership in the North Suburban Consortium (NSC) provides access to gap funding critical in addressing the shortage of affordable housing. To this end, the City worked with the NSC to facilitate affordable housing production by awarding CDBG and HOME funds to local CHDO Medford Community Housing to acquire and renovate a two-family home along Fellsway West in Medford. The project will culminate into two-bedroom and three-bedroom

rental units affordable to families at 60% of the AMI and will subsequently target housing affordability to a lower income subpopulation.

In addition, the City engages private developers seeking zoning relief to create additional housing opportunities for low and moderate income persons and participates in the Local Action Unit Program to ensure long-term affordability.

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

The City, in coordination with the North Suburban Consortium, ensures compliance with Massachusetts lead laws on all homebuyer assistance and developer-driven projects. Testing and lead-safe removal of lead-based paint hazards are required in all HOME and CDBG funded rehabilitation activities.

The City of Medford Board of Health also serves as a point of contact regarding lead-based paint hazards and distributes pamphlets describing lead regulations and resources in their office. Whenever lead concerns arise, the Board of Health refers families to the Greater Lawrence Lead Poisoning Prevention Program to initiate lead home inspections and blood testing.

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

Aligned with its commitment to reduce poverty, the City has prioritized the funding of public service programs that support low-income Medford families in achieving self-sufficiency. Continued support for these anti-poverty programs is crucial as they provide vulnerable, at-risk families with access to a variety of supportive services, basic essentials, advocacy, recreational opportunities, transportation, affordable child care, emergency housing, financial literacy, skill building and job preparedness. The provision of such programming is necessary in addressing the economic, housing and health challenges facing low-to-moderate income residents, enabling families to transition out of poverty.

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

The City continues to enhance institutional structure and programmatic elements with improved coordination, strengthened relationships, prioritization of projects and performance monitoring. Through inter-departmental communication, the Office of Community Development has been readily able to identify ready-to-proceed public works and facility

projects. In addition, collaboration with private, public and non-profit entities has been essential in the implementation of goals and objectives identified in both the 2015-2020 Consolidated Plan and the 2015 Annual Action Plan. The City will continue to evaluate its process for project selection to include a greater focus on outcome measures.

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

The City benefits from a strong network of Medford-based non-profits, regional housing and human services providers. Strong interagency coordination is essential to improving the overall quality of life, leveraging resources, directly impacting the lives of low-to-moderate income residents and shaping viable neighborhoods. The City will continue to seek out ways of expanding our engagement with community partners, enhancing outreach and coordination efforts.

The City directly operates quality programs for Medford elders, through its Council on Aging. Council on Aging helps to connect elderly residents with other community resources, augmenting existing senior programming.

Additionally, the City continues to participate as a member of the North Suburban HOME Consortium to effectively coordinate its housing agenda with surrounding communities.

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

The Diversity Director focused her efforts on the input received from the convening sessions of various groups of individuals and agencies, in and around Medford, over the past year. This direct feedback is important as the information attained in these gatherings tell us where the gaps in serving the community may lie. This information and feedback from the community addresses not just housing issues, but issues that affect day to day lives of our residents.

Actions as a Result of Community Input

The Medford Conversations Group (a grass roots resident coalition representative of approximately 18 local committees and organizations looked to have a more inclusive and responsive community). This group is being led by the Chair of the Medford Human Rights

Commission (HRC). Feedback is that Medford has been adding 'luxury' housing and many individuals in the community cannot afford to live here.

Action:

The Conversations group has met monthly after very deliberately building a vital coalition over a nine month period. The steering committee was formed and agreed on a mission statement. This committee has held 3 formal community discussions to 'Envision Medford'. As a result the topics that will be addressed in the discussions are; affordable housing, climate change, and race. These citywide eight week facilitated discussions of 'conversation to action' will begin in a couple of months.

The Medford Human Rights Commission (HRC) and the Mystic Valley Branch of the NAACP are working to make Medford a more welcoming community for all.

Actions:

The HRC continues its diversity project called 'The World is at Home in Medford'. This project is a part of most community-wide events and collects data on, and displays the diversity of Medford's community.

In January the HRC hosted an MLK event called 'The World House' is at Home in Medford. After some presentations by diverse community members, we discussed immigrants and people of color feeling welcome and secure living in Medford. There were about 200 community participants in attendance.

The Human Rights Commission has established a 'Welcoming Sub Committee' that has me, and continues to meet to address how we make Medford more welcoming, especially our immigrant community.

The Diversity Director invited clergy, the HRC Chair, and a Muslim representative of the Department of Justice, and Muslim community members to engage in ongoing discussions with the Arabic Club of the High School and High staff to both address and move past this negative occurrence.

The Diversity Director and the Human Rights Commission held a community discussion to address the negative language that resulted from a High School event (World Hijab Day) that was postponed due to negative community feedback and hateful speech. A working plan was developed and is being instituted.

The Human Rights Commission held its first City of Medford Iftar Dinner to celebrate Ramadan. It was very well attended by the Muslim community.

The Mass. Association of Human Rights Commission (MAHRC) is in place to assure communities can address civil and human rights for persons of color, immigrants and persons with disabilities. The Medford Commission for Persons with Disabilities is specifically concerned about housing, disability, and public accommodation rights, etc. for persons with disabilities. We are also focused on the needs of our Limited English Proficient community.

Actions:

The Massachusetts Attorney General's Deputy Director for Civil Rights gave a presentation on employment, accommodations, and housing in Medford in May.

In March of this year the United States Attorney on Civil Rights also gave a presentation on civil rights including LGBTQ and Housing issues.

The Disability Commission met to express their ideas to the newly elected Mayor regarding access. Feedback from the disability community included vision issues, accessible housing, and accessible sidewalks. The Commission participated in the Complete Streets Initiative for more accessible sidewalks. The city has purchased a JAWS system for the public library and audible lights for a busy intersection which resulted from feedback from the community with disabilities.

In January the Diversity Director held a forum on the new HUD published Assessment of Fair Housing Tool. The forum was conducted by Metropolitan Area Planning Council. It was well attended.

In April the Senior Advisor on Civil Rights at the Metropolitan Boston Housing Partnership held a forum for property owners, housing marketing staff, and housing and human rights advocates on assisting veterans. Approximately 30 participants were in attendance.

The Diversity Director conducted two accommodation trainings for all staff and members of our Boards and Commissions. This training focused on accommodations for persons with disabilities and with limited English capabilities.

The Diversity Director lobbied the City Council and MBTA officials to not move a bus stop utilized by many persons with disabilities.

The Diversity Director worked with Tufts University students (Community Health) to update and expand the Welcome Booklet for the Community which is available on the city website in many languages.

The Diversity Director is working to have all city alerts available in 11 different languages.

The free Mobile Food Pantry continues to operate year round for our low income families that need assistance. These 75 families get 30 lbs. of fresh fruit, vegetables and other fresh foods each month. We also offer free transportation.

During the past year I (Diversity Director) was asked for assistance from twelve (12) individuals with a variety of accommodation requests for housing. I assist people with the process of how to properly address their concern to rectify the issue.

I was asked seven (7) times this year to assist persons with disabilities in finding accessible and affordable housing. I try to assist with the housing access registry, but housing is limited, especially subsidized housing.

CR-40 - Monitoring 91.220 and 91.230

Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

Under the direction of the HUD Field Office, the Office of Community Development continues to provide quality management and oversight as it carries out the goals and objectives specified in the 2015-2020 Strategic Plan. OCD staff worked to address compliance issues, improve spending, monitor project performance, enhance outcome measures and train staff to better fulfill objectives and oversee sub-recipients. The CDBG Administrator provided primary financial management, contract compliance, reporting and monitoring functions of the office. The Housing Development Specialist facilitated housing activities that increased the production of affordable units and resolved constituent housing issues in the City. The Economic Development Planner continued 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 Plan 91.105(d); 91.115(d)

Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.

In Accordance with HUD regulations, the draft CAPER is to available to the public for a 15-day review and comment period prior to submission.

Notice of the CAPER's availability and of the public presentation were published in the daily newspaper, the Medford Mercury, on September 22, 2016. The CAPER was also made available online at www.medfordma.org and in the Office of Community Development, Medford City Hall.

CR-45 - CDBG 91.520(c)

Specify the nature of, and reasons for, any changes in the jurisdiction’s program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.

The City did not change its CDBG program objectives. It continues to focus on improvements to public facilities and infrastructure, increasing the availability and improving the quality of affordable housing, creation of economic opportunities through redevelopment and business assistance, and support services to low-income households. The CDBG program achieved its goal of primarily serving low and moderate income households; programmatically 89.7 % of the CDBG beneficiaries were low- moderate income families. These service percentages document that the city’s and its projects and programs are serving the intended beneficiaries.

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

No.

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

NA

City of Medford

CDBG Expenditures – Year 41

July 1, 2015 – June 30, 2016

<u>Activity#</u>	<u>Activity Name</u>	<u>Matrix Code</u>	<u>National Objective</u>	<u>Expenditures</u>
	Public Services	05-05W	LMC	\$ 213,058.92
2015-0003-824	Removal of Architectural Barriers - Winthrop & South Street Intersection	03K	LMC	\$ 24,300.00
2015-0002-825	Housing - 705-707 Fellsway West Affordable Housing	14B	LMH	\$ 150,000.00
2015-0003-823	Housing - MHA Walkling Court Improvements	14C	LMH	\$ 10,451.20
2014-0004-806	Senior Center Improvements	03A	LMC	\$ 1,365,381.15
2015-0001-807	Planning & Administration	21A	N/A	\$ 170,170.72
		TOTAL		<u>\$ 1,933,361.99</u>

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