

C A P E R

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Somerville
Massachusetts



Consolidated Annual Performance and Evaluation Report

City of **Somerville**

MAYOR KATJANA BALLANTYNE

**MAYOR'S OFFICE OF STRATEGIC PLANNING
AND COMMUNITY DEVELOPMENT**

Thomas Galligani, Executive Director



Program Year 2022-2023 CAPER

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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.

Program Year 2022-2023 marked the 5th year of the City of Somerville's 2018-2022 Consolidated Plan cycle. While the city has pivoted back to its regular operations for the most part; it continued to close out some of the remaining larger CV-funded activities. The city's ability to accurately benchmark the progress on its original 5-year plan goals remains difficult due to ongoing challenges and delays caused during the pandemic and its related lockdowns. Despite these lingering delays and challenges, the city continued to forge ahead with resuming its regular previously planned programs across CDBG, HOME, ESG, and CV funding. Below is a breakdown of the amounts expended across various project and program categories as well as accomplishment highlights.

CDBG \$2,906,022.52

CDBG-CV \$413,780.46

HOME \$166,899.18

ESG- \$306,942.66

ESG-CV \$509,246.78

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)

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee's program year goals.

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

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected Program Year	Actual – Program Year	Percent Complete
Create and Preserve Affordable Housing	Affordable Housing Public Housing Homeless	CDBG: \$ / HOME: \$	Rental units rehabilitated	Household Housing Unit	40	23	57.50%	20	1	5.00%
Create and Preserve Affordable Housing	Affordable Housing Public Housing Homeless	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	20	14	70.00%			
Create and Preserve Affordable Housing	Affordable Housing Public Housing Homeless	CDBG: \$ / HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	15	9	60.00%	3	6	200.00%
Create and Preserve Affordable Housing	Affordable Housing Public Housing Homeless	CDBG: \$ / HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	0	11		10	11	110.00%
Family Stabilization and Workforce Readiness	Affordable Housing Public Housing Homeless Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	10,000	35,974	359.74%	2,000	10,903	545.15%

Infrastructure and Urban Environment Improvements	Non-Housing Community Development Suitable Living Conditions	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	10,000	45,860	458.60%	21,000	45,860	218.38%
Reducing and Ending Homelessness	Affordable Housing Public Housing Homeless Non-Homeless Special Needs	ESG: \$ / Continuum of Care: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	60	11	18.33%			
Reducing and Ending Homelessness	Affordable Housing Public Housing Homeless Non-Homeless Special Needs	ESG: \$ / Continuum of Care: \$	Homeless Person Overnight Shelter	Persons Assisted	190	0	0.00%	55	0	0.00%
Reducing and Ending Homelessness	Affordable Housing Public Housing Homeless Non-Homeless Special Needs	ESG: \$ / Continuum of Care: \$	Homelessness Prevention	Persons Assisted	337	0	0.00%	45	0	0.00%
Stabilize and Revitalize Diverse Neighborhoods	Non-Housing Community Development Job Creation and Retention	CDBG: \$	Jobs created/retained	Jobs	35	39	111.43%			

Stabilize and Revitalize Diverse Neighborhoods	Non-Housing Community Development Job Creation and Retention	CDBG: \$	Businesses assisted	Businesses Assisted	50	161	322.00%	25	10	40.00%
Stabilize and Revitalize Diverse Neighborhoods	Non-Housing Community Development Job Creation and Retention	CDBG: \$	Buildings Demolished	Buildings	1	0	0.00%			

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.

As noted through the accomplishments described below the city remains focused on executing across all the goals and program areas outlined in its 5-year and annual plans. While the previous two years certainly caused unexpected delays and brought rise to new challenges the city is now pivoting back to its strategy to focus resources on areas such as small business assistance, infrastructure, and urban landscape improvements; and the persistent issue of housing affordability that has plagued much of the northeast corridor in the United States and the City of Somerville acutely. The city will continue to leverage its CPD and CDBG resources in particular to launch new and creative programs and activities meant to address the burgeoning issues of the moment. This will include the continued build-out and launch of the Clean Green Rehab program to assist both individual residents and the city as a whole in reducing its carbon footprint and achieving its sustainability goals. The city will also continue to invest in open space and urban forestry initiatives that will also be aimed at combatting the carbon-intense impacts of a densely urban city such as Somerville.

On the Housing front, the City will look to continue to use CDBG and HOME funds to create and acquire as much affordable housing as possible through all available means including acquisition, new development, rehabilitation, rental, and homebuyer subsidies. The city will also continue to use its public service allowance to support our non-profit partners as they provide the necessary and critical wrap-around services needed to ensure the success of our low to moderate residents as they continue to navigate a rising cost-of-living environment.

Finally, throughout all these programs the city will look to supplement all of these programs through additional funding through other federal, state, and local funding to maximize the impact and effectiveness of these dollars.

Accomplishments

Economic Development- The primary focus on economic development continued to be on assisting local small businesses as they continued to emerge from post-Covid conditions and attempt to compete with the large-scale development occurring in Somerville's key neighborhood business districts. The city's primary partners in serving low to moderate-income businesses continue to be the East Somerville and Union Square Main Street organizations. These local organizations continue to work closely with small businesses to provide real-time technical assistance to small businesses as they navigate the city-expanded outdoor dining policies, compete in an increasingly digital economy, and deal with current workforce challenges such as training, development, and workforce retention.

Housing Rehab and Acquisition- The City spent the majority of the program year redesigning and re-tooling its Housing Rehab program to put more of an emphasis on sustainability and healthy homes initiatives to reduce energy costs and improve housing conditions for low to moderate-income residents. The city hopes to re-launch this program in the next program and catch up on existing projects that are awaiting in the pipeline. On the Acquisition front, the city was able to fund the acquisition of 7 Summer St. the inaugural project of the Somerville Community Land Trust which created 3 affordable homebuyer opportunities for moderate-income households.

Infrastructure and Urban Environments- The city once again resumed work on projects that had been previously planned prior to the pandemic. In particular, the city was able to finalize the design of Junction Park which will create nearly an acre of new public open space adjacent to the newly completed Green Line extension rail corridor and community path. This new community open space will provide a place of respite and improve public access to the recently opened Lowell Green Line station. The city was also able to resume its regular scale tree planting program planting 114 new trees during the program year.

Public Services- The city continued to support its extensive network of non-profit partner organizations providing a range of services from youth employment readiness to senior transportation and food pantry services. The City also continued to wind down CDBG-CV public services activities that were remaining from the emergency programs funded during the pandemic.

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)

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

	CDBG	HOME	ESG
White	752	6	283
Black or African-American	246	2	174
Asian	78	0	6
American Indian or American Native	62	0	6
Native Hawaiian or Other Pacific Islander	6	1	6
Total	1,144	9	475
Hispanic	527	2	85
Not Hispanic	617	12	13

Narrative

The City of Somerville identifies priority needs and offers services and programs to eligible individuals and households regardless of race or ethnicity the table on this page depicts counts for Program Year 2022 by funding source. Entitlement funds were distributed among Somerville residents from extremely low-income, low-income, and moderate-income persons and households and high concentrations of minorities.

Demographic data shown is a partial representation of all households and individuals served. While the city requires all sub-recipients to collect and report on demographic data for their client populations, not all program households and individual participants wish to provide demographic data. Therefore, based on the data collected and reported approximately 1,100 individuals were assisted through CDBG, and 14 Households were assisted through the HOME Tenant Base Rental Assistance program. Approximately 3/4 of respondents categorized themselves as white/other multi-racial and 1/2 of respondents categorized themselves as Hispanic.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Table 3 - Resources Made Available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	Public - Federal	2,548,810	2,906,023
HOME	Public - Federal	529,653	166,899
ESG	Public - Federal	217,111	306,942
Other	Public - Federal	3,816,837	923,027
Other	Public - Local	3,816,837	923,027

Narrative

The chart above displays the amounts awarded and expended to the standard City entitlement programs. In addition to the amounts expended across the annual CDBG and HOME programs, the city also continued to administer and distribute the remaining balances in its CDBG-CV and ESG-CV CARES Act allocations. Across those programs, the City expended \$413,780.46 in CDBG-CV funds mainly on the rental assistance and food security CV Activities and \$509,246.78 in ESG-CV funds primarily across rental assistance and street outreach programs.

The City also is in the planning stages of developing a HOME-ARP plan which will lay out a roadmap for the eventual distribution of approximately \$1.3M in HOME ARP funding.

Identify the geographic distribution and location of investments

Table 4 – Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
City Wide	20	40	Target areas outside of the NRSA's
East Somerville	20	5	
Hillside	-	-	
Inner Belt/Brick Bottom	20	-	
Union Square	20	50	
Winter Hill	20	5	

Narrative

On a dollar expended basis, the majority of program year 2022 CDBG funds were expended in the Union Square district with 7 Summer Street located just at the edge of the Union Square core neighborhood. The bulk of remaining funds were expended on a City-wide basis with many of the public service

activities and housing activities serving a citywide benefit. Additionally, the City's Tree planting program also is a citywide program with tree planting locations selected across all eligible low-income census tracts throughout the city. In terms of specific projects, funds were expended on two specific parks projects Junction Park and Healey Fields which are in the Winter Hill and Winter Hill bordering East Somerville districts, respectively.

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 was used to address the needs identified in the plan.

The City of Somerville can leverage and match CDBG and HOME funds across virtually all program areas. The city has continued to develop creative programs and funding sources that complement a broad range of activities across the CDBG and HOME programs.

Economic Development - The City has been to leverage and enhance programming in its First Source workforce development program both through large-scale commercial development mitigation fees and through the recently created Jobs trust fund. Also, the city provides a general fund match to the Main Streets technical assistance programs.

Affordable Housing- Due to the high cost of housing in Somerville and the Greater Boston Area the City of Somerville has developed and expanded multiple programs which leverage and match many of the affordable housing programs undertaken with CDBG and HOME funds. The primary matching sources for CDBG and HOME programming come from the Somerville Affordable Housing Trust and the Community Preservation Act, which provides a stand-alone allocation of CPA through the Housing Trust fund. These funds match and leverage several programs including, rental assistance and TBRA programs, Acquisition and Rehab activities via 100 Homes, and New Development projects which may include other sources of financing including LIHTC and other vehicles. Lastly, inclusionary Housing provides a non-monetary source of affordable housing match through the development of in-kind affordable units in large-scale residential projects.

Parks and Urban Forestry- The city has had a long track record of funding park projects with matching state-sponsored PARC grants and local Community Preservation Act funding. This remains true in the program year 2021 and the junction park project. Additionally, in 2021 the Healey School Fields project, in addition to CDBG funds, was funded through a \$6M city general obligation fund.

Public Services- Public Service agencies are required to disclose and demonstrate sources of matching funds during both their RFP applications for funding and at project completion through their final progress.

A detailed chart of matching funds is attached below.

CDBG Public Services Match							
Agency	AwardFY2022	Description	Match	Match amt	Private	State/Local	Federal
Center for Teen Empowerment, 165 Broadway, Somerville 02143	\$50,000.00	Youth Organizing Initiative	Shannon CSI, DHP Youth at risk contracts, City of Somerville.	\$ 204,913.00		\$ 204,913.00	
MAPS MA Alliance For. Speakers, 1046 Cambridge St, Cambridge 02139	\$17,000.00	Immigrant Integration Services	Malden Industrial Aid, United Way, Contributions (Budgeted)	\$ 7,200.00	\$ 1,200.00	\$ 6,000.00	
Mystic Learning Services, 530 Mystic Ave, Somerville 02145	\$40,000.00	Empowering Competent Youth Program	Somerville Housing Authority, MA Cultural Council, Drueding Foundation, City of Somerville Youth Wages, Cummings Foundation, Somernova.	\$ 115,250.00		\$ 115,250.00	
Respond Inc, P O Box 555, Somerville 02143	\$32,000.00	24 HR Crisis Hotline	Adams Foundation	\$ 13,600.00	\$ 13,600.00		
Som Homeless Soup, 1 Davis Square, Somerville 02144	\$124,158.00	Food Pantry & Meal Program	FEMA, Fundraising/Donations, BOA, Cambridge Savings, Mount Auburn	\$ 263,135.00	\$ 103,135.00	\$ 25,000.00	\$ 135,000.00
Som Homeless, 1 Davis Square, Somerville 02144	\$15,000.00	Volunteer Prog Resource Center & Coordinated Entry	HUD CE	\$ 96,033.00			\$ 96,033.00
Welcome Project, 530 Mystic Ave, Somerville 02145	\$20,000.00	Stepping Up to a Somerville Promise	Various Foundation, Private Donations	\$ 151,000.00	\$ 151,000.00		
	\$298,158.00			\$ 851,131.00	\$ 268,935.00	\$ 351,163.00	\$ 231,033.00

2022 ESG Agency Match Contribution							
Agency	Award FY22	Description	Match Source	Match Amount	Private	State/Local	Federal
Som Homeless Coalition - Shelter operations, Outreach and Prevention	\$116,000.00	Shelter Operations	Department of Housing and Community Development (DHCD)	\$407,448.29		407,448.29	
Caper 22 ESG Match	\$116,000.00			\$407,448.29	\$0.00	\$407,448.29	\$ -

Table 5 – Fiscal Year Summary - HOME Match Report

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	15,883,760
2. Match contributed during the current Federal fiscal year	2,337,972
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	18,221,732
4. Match liability for the current Federal fiscal year	0
5. Excess match carried over to the next Federal fiscal year (Line 3 minus Line 4)	18,221,732

Table 6 – Match Contribution for the Federal Fiscal Year

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match
109 Prospect Street Unit 304	02/28/2023	0	0	395,239	0	0	0	395,239
13 Alpine Street	11/02/2022	0	0	897,790	0	0	0	897,790
60 Cross Street Unit 108	02/01/2023	0	0	6,800	0	0	0	6,800
60 Cross Street Unit 210	12/16/2022	0	0	402,834	0	0	0	402,834
7 Summer Street Unit 3	06/09/2023	0	0	635,309	0	0	0	635,309

HOME MBE/WBE report

Table 7 – Program Income

Program Income – Enter the program amounts for the reporting period				
Balance on hand at the beginning of the reporting period \$	The amount received during the reporting period \$	Total amount expended during the reporting period \$	Amount expended for TBRA \$	Balance on hand at the end of the reporting period \$
29,180	61,803	29,180	1,641	60,790

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period

Table 8 - Minority Business and Women Business Enterprises

	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Contracts						
Dollar Amount	0	0	0	0	0	0
Number	0	0	0	0	0	0
Sub-Contracts						
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

	Total	Women Business Enterprises	Male
Contracts			
Dollar Amount	0	0	0
Number	0	0	0
Sub-Contracts			
Number	0	0	0
Dollar Amount	0	0	0

Minority Owners of Rental Property – Indicate the number of HOME-assisted rental property owners and the total amount of HOME funds in these rental properties assisted.

Table 9 – Minority Owners of Rental Property

	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

Relocation and Real Property Acquisition – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition.

Table 10 – Relocation and Real Property Acquisition

Parcels Acquired	0	0
Businesses Displaced	0	0
Nonprofit Organizations Displaced	0	0
Households Temporarily Relocated, not Displaced	0	0

Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

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, and the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

Table 11 – Number of Households

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	9	0
Number of Non-Homeless households to be provided affordable housing units	35	21
Number of Special-Needs households to be provided affordable housing units	0	0
Total	44	21

Table 12 – Number of Households Supported

	One-Year Goal	Actual
Number of households supported through Rental Assistance	15	11
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	15	1
Number of households supported through Acquisition of Existing Units	0	9
Total	30	21

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

The affordable housing performance metrics reported in this Capex represent a mix of accomplishments achieved through both the standard entitlement program funds expended and the supplemental CARES Act funds expended. The goals for funds expended through CARES Act funding were not incorporated into the City's original 5-year consolidated plan. The results shown display above-average performance for the rental assistance category as the predominant focus of CARES Act funding was placed on rental assistance across both the CDBG and ESG programs. Additionally, the lack of progress in the creation of new affordable units was due to a pause in the 100 Homes and Housing rehab program due to staffing capacity issues and re-evaluating the program design and operating models of both those programs.

Discuss how these outcomes will impact future annual action plans.

Going forward the City looks forward to resuming activities that will make meaningful progress in adding much-needed units to the city's affordable housing inventory. In addition to participating in future

Community Land Trust acquisitions, the city looks forward to resuming the 100 Homes acquisition program as well as funding new development projects through future HOME investment partnership funds. The city will continue to fund TBRA, and homelessness prevention and supportive services through its HOME-ARP allocation plan.

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.

Table 13 – Number of Households Served

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	0	0
Low-income	0	11
Moderate-income	4	6
Total	4	17

Narrative Information

The City of Somerville was able to assist 14 Households in securing affordable housing in the program year 2022. The city accomplished this through its Tenant Rental Assistance, Down Payment Assistance, and Rehab and Acquisition programs. The greatest demand was seen in households in the 0-30% median income range with only one moderate-income family receiving assistance. The City assisted a range of households varying in household size from 1 to 5 people and across various demographic backgrounds with the most common being households that identified as white and multi-racial.

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 street outreach team from Somerville Homeless Coalition, in coordination with Health Care for the Homeless and in partnership with the Somerville Police Department, performs regular weekly outreach to engage the unsheltered homeless population. Known locations are visited by the street outreach team, and the routes are frequently updated with the information the team gathers through their networking with those who are unsheltered and by partners like the Somerville Police. The teams build rapport with the homeless and try to engage them in services. Once trust is established, unsheltered persons may be ready to accept assistance and linkage to other services. The street outreach team had great success recently in getting an individual who was unsheltered and very hesitant and wary of assistance into a shelter and connected with services. The individual had been homeless and lived unsheltered on the street for over a decade. The team was able to gain trust slowly over time and make incremental progress in a manner that was comfortable with the individual. The Somerville Homeless Coalition has added another staff member to expand the capacity of their street outreach team.

Through coordinated entry within the Balance of State (The Somerville Arlington CoC or MA-517 merged into the Balance of State in CoC in the fall of 2019) and through working closely with the Somerville Homeless Coalition, the City of Somerville Housing Division and the City of Somerville Office of Housing Stability Division, homeless and individual needs are assessed to determine the appropriate assistance, either through shelter and eventually re-housing or through prevention. The CoC worked closely with Federal, State, and local agencies to develop the CoC's Coordinated Entry model which includes a strong outreach and assessment component to sheltered and unsheltered homeless individuals and households with children. Additionally, through the CoC, local homeless service providers practice the housing first strategies which include proactive outreach and engagement efforts, low-barrier housing entry policies, rapid and efficient entry into permanent housing, voluntary supportive services, and a focus on housing stability. Homeless services within the City of Somerville are delivered via a community-based network of organizations that work together to assist homeless families and individuals in moving toward self-sufficiency.

The City, in conjunction with the Somerville Homeless Coalition, has increased its street outreach efforts in response to the heightened level of unsheltered homelessness resulting from the impacts of the Covid 19 Pandemic. With the availability of ESG-CV funds, the city was able to increase its funding amount allocated towards street outreach activities. The funding was used to increase staff capacity and directly address the unsheltered homelessness epidemic head-on. The city is nearing the end of its street outreach activities contracted through CV funds.

Addressing the emergency shelter and transitional housing needs of homeless persons

Several Somerville agencies within the CoC receive funds from HUD, the Department of Public Health, the Housing and Shelter Alliance, the Department of Children and Families, the Veterans Administration, and local foundations and private donations that provide emergency and transitional housing services. According to the 2020 unsheltered point-in-time count, there were a total of 16 unsheltered persons in Somerville. Persons receiving emergency and/or transitional housing services were assessed and connected to the appropriate temporary housing component while the permanent housing component was identified. While victims of domestic violence and youth may benefit from transitional housing resources, the majority of homeless persons are better served by permanent housing. The type of permanent housing depends on the assessment score of each household. Households with low barriers will be placed in a Rapid Re-Housing program while households with persons with disabilities or those that meet the chronically homeless definition will be placed in permanent supportive housing.

The City of Somerville is the recipient of ESG funds. The City issued an annual RFP to all homeless prevention and rapid re-housing providers, and emergency and transitional housing providers. Approximately 44% of the ESG funds were awarded to programs designed to prevent homelessness address rapid re-housing of homeless persons and assist persons struggling to maintain their housing. Approximately 56% of the ESG funds were awarded to programs providing street outreach, shelter operations, and essential services expenses.

The City also has an Affordable Housing Trust Fund, which funds tenancy stabilization programs to help with arrears, first or last month's rent, and security deposits which helps with prevention and initial startup costs for re-housing. Additionally, the Trust also funds prospective rental programs for up to two years to help stabilize households and maintain their housing.

Despite this, incomes for households in emergency and transitional housing overall continue to lag while rents have continued to increase, the vacancy rate remains low for affordable rental units and other expenses like childcare, energy, transportation, health insurance, and food continue to increase. The City has worked to expand affordable rental housing through its funding (both Community Preservation Act funds and the Somerville Affordable Housing Trust funds) of the 100 Homes Program in partnership with Somerville Community Corporation. Scattered site affordable rental units are affordable to households at various income tiers, including up to 50%, 60%, 80%, and 100% AMI. Those who are homeless (living in a shelter or EA hotel/motel, doubled up, on the streets, or in other places not meant for human habitation) and those at risk of being homeless receive a preference and priority for housing. Additionally, Somerville homeless provider agencies within the Balance of State CoC that administer permanent supportive housing programs are given priority on a maximum of two 60% AMI or below units.

The City of Somerville is committed to working with housing and service providers to provide housing-related resources needed to provide emergency and transitional housing for homeless persons.

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

The city and the Balance of State CoC (BoS CoC) identify people who are homeless and those most in need of permanent supportive housing services through the BoS coordinated entry program. The Somerville Homeless Coalition provides coordinated entry services for the BoS in the metro Boston Area. Households being discharged from institutions and systems of care and those who are chronically homeless and unaccompanied youth are among the most vulnerable. The City has utilized ESG funds to address the urgent needs of the homeless and near homeless through a variety of housing options including emergency and transitional housing such as short-term shelters, scattered-site transitional housing units, and dormitory-style transitional housing as well as various Rental Assistance and Tenancy Stabilization Programs. Other local programs offer access to a broad range of other services including case management, employment assistance and job readiness and training, utility assistance, life skills including budgeting, health care, childcare, and transportation.

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 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

The supportive services and case management offered by local homeless providers have been instrumental in helping households transition to permanent housing, including the development of household self-sufficiency plans. Additional services such as financial budgeting, and assistance with transportation, childcare, utilities, clothing, and access to food pantries, are also helpful in transitioning to permanent housing and independent living. The providers also help with application assistance and startup costs, as well as ongoing rental assistance into the City's inclusionary affordable units as well as affordable units through the 100 Homes Program. Follow-up case management services and support services as necessary, including legal assistance from another local provider help to prevent individuals and families from becoming homeless again.

ESG funds were used to provide short- and medium-term rental assistance to those at risk of becoming homeless as well as homeless. For the clients receiving funds for arrearages, case management was geared toward budgeting, increasing income, payment plans (if the funding amount did not cover the full arrearage amount), and other factors surrounding rental payments to prevent future housing instability. Prevention assistance was in very high demand.

CDBG Public Service funds have helped community providers and residents access services, information, prevention, and referral through the 24-Hour Information and Referral Hotline by providing accurate contact information on mainstream services and how to access them. The Volunteer Coordination Program has provided trained volunteers at the shelters who have provided companionship, and interaction with families and utilize the shelter's playroom to organize fund and educational activities for the children residing in the shelters; Domestic Violence staff have provided safety net planning and resources for DV victims, as well as assistance, in court proceedings; Immigrant Social Services have been provided by bilingual counselors for non-English speakers seeking services to assess their housing, health and education needs; Coordinated Entry has provided a whole host of qualitative services and system management for the entire CoC and provided outreach, case management and housing search assistance to approximately 84 homeless/at-risk people across the CoC. Public Service funding for ESOL Classes and workshops focused on understanding housing policies has helped individuals and families obtain and retain housing and avoid becoming homeless. Public Service funding has provided aftercare and follow-up services for low-income residents transitioning from system care.

Local service providers have provided education, employment, and financial literacy by managing programs providing employment training and educational programs to promote financial stability and self-sufficiency. Fortunately, the supplemental CARES Act funding provided in 2020 has enabled the city to significantly increase its funding to public services during these times when those at risk of homelessness have been disproportionately impacted.

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

Actions taken to address the needs of public housing

The Somerville Housing Authority's 5-Year Plan states the following strategy they will employ to address Housing Needs.

"The SHA will continue to review waitlist data and priorities to assure, to the maximum extent possible, the housing of eligible area applicants. SHA will continue to process emergency applications in conformance with approved policies. SHA will continue to participate in the City of Somerville and area agency forums designed to inform area residents of affordable housing opportunities. SHA has recently completed a waitlist update to remove outdated applicants and allow focus on remaining applicants."

Waiting lists for all forms of public housing are very long. In addition, the Somerville Housing Authority is part of the Centralized Section 8 Waiting List. The list contains 1495 Somerville applicants and annual turnover is around 50 vouchers per year, meaning it would take close to 30 years to get through the list. There are currently no new Section 8 vouchers available.

Based on this data, the need for affordable rental housing in Somerville is overwhelming.

The City of Somerville will continue to rely on the Somerville Housing Authority to be the major provider of subsidized housing through public housing and vouchers. Most of the households on the SHA waiting lists cannot afford a rental unit on the private market and are therefore waiting for a subsidized unit to solve their housing needs. To that end, the priority of the City of Somerville to increase the number of subsidized affordable units, particularly rental units, is the main focus of this plan. To that end, the City is working closely with the Somerville Housing Authority and its selected developer to implement the reconstruction of Clarendon Hill, a 216-unit state-assisted public housing development. Under its proposal, all 216 units would be replaced, and additional middle-income workforce housing and market-rate units would also be included in the project. The city will also be supporting the project through local funds and will explore the opportunity to use its HUD funding sources as part of its financing package.

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

Concerning management, each SHA building has a tenant association that assists in planning for the development's unique needs. SHA's Resident Services team has hosted many events to establish and maintain strong functioning associations. SHA also provides a share of operating funds and 25% of funds raised from laundry machine use to the tenant associations for their use as they see fit.

The City's Inclusionary Housing Program creates affordable rental and homeownership units via a minimum 12.5% requirement for properties building more than 6 units of new housing (and in larger projects above 8 and 17 units respectively, 17.5 and 20%). The Housing Division will continue to actively market these units via the SHA to encourage eligible residents to apply.

The city is actively encouraging increased homeownership among public housing residents as well. Given the high cost of ownership housing in Somerville, most public housing residents can only afford ownership units through the City's Inclusionary Housing Program. The SHA also offers a Homeownership Program that allows families with Section 8 vouchers to use their vouchers to help pay the mortgage on a home they buy, and the SHA subsidizes the mortgage for 15 years after the purchase. Families who participate in their Family Self-sufficiency (FSS) program (which helps to prepare residents for owning their own homes) have the priority for homeownership slots. For state public housing, SHA was recently approved for a grant that is similar to their FSS Program called MASS LEAP where an account is created for tenants and funds are deposited when there are rent increases based on increased earned income.

In addition, the Somerville Community Corporation, Somerville's CHDO, offers First-Time Homebuyer Education classes and Financial Literacy classes to help Somerville residents start saving for their goals. In addition, the City will continue to offer First-Time Homebuyer Assistance to income-eligible homebuyers purchasing property in Somerville, making homeownership more accessible.

Actions taken to assist troubled PHAs

Fortunately, the SHA is not on HUD's list of troubled public housing authorities and is a solid partner in strategizing to provide the community with quality safe, and affordable housing.

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, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)

Specific actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing include providing adequate land for a variety of housing types through review by Zoning and land use updates, working to eliminate obsolete and prescriptive building code requirements, continuing to educate the public on the need for affordable housing and promoting a diversity of affordable housing programs, continuing to streamline the permitting and coordinating with local, state and federal agencies in implementing programs that support affordable housing. The city is supportive of the development of affordable housing and staff is available to meet with affordable housing developers to discuss options to expand affordable housing opportunities and strategies for extremely low, very low-, low- and moderate-income households, and provide additional supportive services and homeless assistance throughout the community.

The City's Inclusionary Housing Program creates affordable rental and homeownership units via a requirement to provide 20% of units as affordable for projects with four + units, and for properties with two existing units that wish to add a third unit, one unit is required to be affordable. The Housing Division continues to actively market these units as widely as possible via a listserv with over 9,000 households on it, newspaper ads, fliers to local organizations and businesses, and posting on Mass Access and the Metro List, among other outreach efforts. For projects with 30 or more units, 20% of the affordable units must be three bedrooms or more to ensure more family-sized affordable units in our inventory.

In addition, the city convenes meetings of interested citizens, community organizers, low-income neighborhood residents, and others including affordable housing advocates, social service agencies, and homelessness housing advocates to allow citizens an opportunity to present their views on community needs. In late program year 2022, the city launched its first-ever anti-displacement task force to specifically study and address the most prevalent factors contributing to displacement in the city. Information is disseminated using various print media outlets. The enforcement of both linkage fees and the Inclusionary Housing Ordinance helps offset the cost of affordable housing for low-income workers and mitigate some of the need for increased affordable housing due to employment growth. Affordable housing developers are offered assistance to include financial incentives in the form of low-interest loans, technical assistance to secure tax credits, and pre-development assistance during the pre-construction phase.

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

The city continues to educate the public on the need for affordable housing and promotes a variety of affordable housing programs. The city holds public meetings to inform citizens of housing

programs. The city takes actions to eliminate identified gaps and to strengthen and coordinate the delivery system such as streamlining the permitting process, coordinating social services with housing treatment areas, and participating on committees involved in housing and social service delivery.

Over the past several years, the robust growth experienced in the city's real estate market and development pipeline has enabled the city to continue growing its tax base. Subsequently, the city has judiciously allocated a significant amount of resources to invest in the City's Office of Housing Stability and related programs, the Health and Human Services departments (through increased investment in city-staffed social workers and investments in food security programs), and the Communications, Immigrant Services, and Racial and Social Justice departments. The additional investments in these city-sponsored resources will directly impact and improve the City's ability to meet the needs of underserved residents.

In addition to city-operated and sub-recipient programs and activities, many local non-profit agencies help address obstacles in meeting underserved needs. These local non-profits also address the priorities in the Consolidated Plan and receive funding through public sources, private foundations, donations, and fundraising. While the city has substantially completed expended its CARES Act funding, Fortunately, the city can continue some of the supplemental funding that was provided to our non-profit network partners through the recently approved ARPA funding. The main goal of all services is to help individuals gain or regain self-sufficiency.

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

The City of Somerville is in full compliance with Federal Title 1012/1013 regulations, Section J, which requires that lead-based paint be addressed in all properties receiving Federal Funds for housing rehabilitation. Safe work practices and all requirements under Title 1012/1013 have been fully integrated into existing housing rehabilitation programs, which are funded primarily with CDBG and HOME grants. A fully implemented plan for addressing lead-based paint hazards has been in effect in the city since 2001. While the dedicated Lead Hazard Abatement grant has ended Somerville continues to support lead hazard abatement needs and projects through an expanded Housing Rehabilitation program.

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

The city collaborates with local social service agencies to continue efforts to reduce the number of families and individuals living in poverty. Staff focused primarily on supporting programs that raised household incomes and stabilized housing situations. Eliminating poverty is a clear concern of the city. Efforts are constantly underway to improve the quality of life and economic conditions for families, for example:

The city supports a broad network of public service programs to assist those emerging from poverty. These include family stabilization services and information and referrals including affordable childcare, teen job readiness programs, etc.

The city works with community development groups to support their efforts to train and uplift people in poverty and invest in economic development programs. The city partners with area agencies on economic development programs for low-income neighborhoods. Using CDBG funds, the City has provided for small business assistance and has nurtured microenterprise development.

Strategies to reduce poverty and maximize income include access to employment and non-employment cash benefits through provider staff training in SSI/SSDI, Outreach, Access, and Recovery (SOAR) to assist clients applying for SSI and encouraging referrals to One Stop and Mass Rehab. Providers also work closely with the Somerville Community Corporation's First Source Jobs Program which connects job seekers with local employers and provides soft skills training, leadership development, and one-on-one coaching (job search through post-placement). Strategies to access mainstream benefits for poverty-level families through HUD-funded projects include a review of HMIS data on client income and benefits to analyze whether clients are getting all possible benefits. Staff assists with food stamp, Medicaid, and other applications and Cambridge Somerville Legal Services assist with appeals of denials. HMIS data quality monitoring and analysis is another part of the actions to reduce the number of poverty-level families.

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

In the five-year strategy, the city described the institutional structure, including private industry, non-profit organizations, and public institutions through which it will carry out the affordable and supportive housing strategy. The city assessed strengths and gaps in the delivery system and set forth an improvement plan. The city aims to eliminate identified gaps and strengthen and integrate the delivery system by pursuing other funding sources for affordable housing as they become available.

The city developed and maintained strong supportive relationships with elected officials at all levels of government. Fiscal responsibility was maintained while developing strategic partnerships with housing advocates, private and nonprofit organizations, business and community groups, and residents to exercise leadership in responding to the future of Somerville's housing and community development needs.

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

Housing and social service providers collaborate regularly through participation in the CoC's monthly meetings and its various subcommittee meetings. A City Housing Division staff member serves as the CoC Lead and can serve as a liaison between the city and housing and social service agencies. These meetings also include representatives from agencies serving a broader group of

residents at the poverty level, such as Community Action Agency of Somerville, RESPOND, Cambridge and Somerville Legal Services, and others who provide non-housing services such as employment training, mental health counseling, veteran's services, elder services, financial literacy, immigration services, and health services.

The CoC also maintains an inventory of housing, as well as social service providers, and includes details such as the subpopulation served as well as the services provided. Several social service agencies have offices located in public housing and attend general meetings of the housing authority to identify problems in advance and have the opportunity to help resolve a crisis immediately. Please see the Public Housing section of the Consolidated Plan for more information regarding the consultation and coordination with the local Public Housing Association, as well as information about the encouragement of public housing residents to become more involved in the management of the properties and information about becoming future homeowners.

Developers of housing projects coordinate with the City, the SAHTF Somerville Affordable Housing Trust Fund, and typically the Massachusetts Department of Housing and Community Development regarding the provision of state resources to City-supported projects, such as Massachusetts Affordable Housing Trust Funds, State HOME funds, LIHTC and other state housing funding resources. This includes participating in general discussions and consultations on overall housing goals at both the local and state levels, as well as discussions with DHCD staff on specific housing development projects that are seeking multiple funding sources. In addition, the city and the Somerville-Arlington CoC coordinate with the State on ESG activities to ensure the best use of prevention and rapid rehousing resources. The CoC's development of the Coordinated Entry vulnerability tool, which assists in identifying risk factors, will help with strategies to reduce and end homelessness by bringing together providers through a coordinated referral process to utilize ESG prevention and rapid rehousing funds, state Home-based rapid rehousing funds to divert imminently homeless families, as well as Emergency Food and Shelter Program funds through FEMA to assist with rent, mortgage and utility assistance.

The city also consults with MAPC on city planning efforts and participates in regional efforts such as Inner Core planning meetings, a middle-income housing study, and the Metro Mayor's meetings. Also, in recent years the city has commissioned or supported multiple working groups, including the Union Square Civic Advisory Committee and the Sustainable Neighborhoods Working Group, that include a diverse membership from these different areas to coordinate planning efforts around housing and services within the city. The City also does outreach to these entities in planning for different neighborhoods through Somerville by Design.

The city created strategic partnerships to enhance the availability of resources and leverage services provided to low- and moderate-income residents and neighborhoods.

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

The City of Somerville's Housing Division submitted an Assessment of Fair Housing Report (AFH) to the Housing and Urban Development Agency (HUD) on October 6, 2017, based on the Affirmatively Furthering Fair Housing (AFFH) Rule created in 2015; HUD accepted the 166-page report without conditions in November 2017.

The AFH report replaced the previously used Analysis of Impediments (AI) with the Fair Housing document. The assessment is designed to help participants identify the fair housing barriers that exist in their communities, what the contributing factors to these barriers are, and what participants can do to address them. Based on the report, the Housing Division and the Fair Housing Commission identified and are taking action to address fair housing issues in the community.

Based on extensive community engagement efforts summarized in the AFH, Somerville identified goals and actions it seeks to fulfill in six fair housing-related subject areas: Segregation and Integration, Disparities in Access to Opportunity, Disproportionate Housing Needs, Publicly Supported Housing, Disability and Access Issues, and Fair Housing Enforcement, Outreach Capacity and Resources.

Actions taken by the City and the Fair Housing Commission to meet the goals identified in the AFH report include increasing awareness and education of Fair Housing law and rights through targeted outreach at community events, holding a workshop with the Massachusetts Commission Against Discrimination regarding submission of discrimination complaints, exploring regional collaborations with the Suffolk University Housing Discrimination Testing Program and educating participants of First Time Home Buyer classes on Fair Housing Law through attendance at monthly meetings. Moreover, the city has positioned itself to meet its goals by reallocating staff resources to revise the job description for a vacant program specialist position, to focus it specifically on fair housing and related issues. That individual, hired in February 2018, serves as a liaison to the Fair Housing Commission among other duties.

These actions are part of a broader set of goals and actions the City seeks to accomplish in the short and long term. Finally, factors that contribute to selected fair housing issues have been designated as being of the highest priority, including ones that limit or deny fair housing choice or access to opportunity, or negatively impact fair housing or civil rights compliance. In the 2017 AFH report, in the area of Fair Housing Enforcement, Outreach Capacity, and Resources, the factor(s) with the highest priority were: lack of education on fair housing laws, tenant/landlord rights, outreach, and enforcement.

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

The city worked closely with all its sub-recipients to ensure that the goals and objectives of the HUD programs were adhered to and National Objectives were being met. The Mayor's Office of Strategic Planning was responsible for both the financial and program monitoring of sub-recipient activities to provide assurances that the sub-recipients administered federally awarded funds in compliance with federal requirements, ensuring that required audits were performed and sub-recipients took prompt corrective action on any audit finding and evaluated the impact of sub-recipient activities to comply with applicable federal regulations. OSPCD staff monitored CDBG Public Service and ESG contracts for compliance, financial management systems, timeliness, and programmatic activity. Staff was committed to providing accurate unduplicated demographic information in IDIS to comply with HUD reporting requirements. Client demographics entered in HMIS for ESG participants were reviewed for data quality.

CDBG projects were assigned to a project manager who was responsible for the negotiation and execution of a contract to implement project activities. All contracts fully addressed all HUD, state, and local requirements and included a detailed project scope. The project manager, in conjunction with the compliance officer, is also responsible for contract compliance and project management representing the City as a grantee. Ongoing technical assistance was provided throughout the contract period.

Sub-recipients entered into detailed agreements with the City to ensure all federal, state, and local regulations and criteria were being adhered to and met. Monthly and/or quarterly desk audits of reports and supporting documentation from sub-recipients allowed the city to monitor the progress each sub-recipient was making toward its year-end goal(s). On-site monitoring was conducted by OSPCD to further ensure that overall goals and objectives were being met, timelines were met and required records were maintained to demonstrate compliance with applicable regulations. City staff watched for potential of fraud, waste, mismanagement, and/or other opportunities for potential abuse. Contract provisions were in place that provided for the suspension of funds, termination of the contract, and disallowance of reimbursement requests during the program year based on performance deficiencies. City staff worked with sub-recipients to correct identified deficiencies through discussion and/or technical assistance, before imposing any sanctions.

The city also conducted on-site monitoring of federally funded construction projects to ensure compliance with Davis- Bacon wage laws and other local, state, and federal requirements. Housing activities were also monitored with the assistance of Housing Inspectors and staff, and where appropriate, with the City's Building Inspectors. This allowed for multiple levels of oversight of various local, state, and federal requirements.

In the program year 2020, the City also launched a newly created Office of Racial and Social Justice that will be focusing its efforts on the broader issues of racial and social inequality. The Office of Strategic Planning is also hiring a Strategic Planning and Equity manager and a women and minority business senior planner who will exclusively work on minority business outreach and comprehensive planning efforts.

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.

The City held a public hearing to present the draft 2023 CAPER results on September 21, 2023. A comment period remains open from September 21st, 2023 through October 5th. The meeting was advertised by the City of Somerville's citizen participation plan and a draft of the Caper was made available on the city website during the comment period.

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 of Somerville has not changed the objectives of its CDBG program and continues to strategically use CDBG funds to maximize leverage for infrastructure and public facility improvements, housing development and homeownership, public services, commercial revitalization, and planning and administrative activities. Somerville went through an extensive planning process where it identified several goals and objectives in the five-year plan that were intended to guide the programs and activities undertaken to aid and serve the low to moderate-income residents of the community. In this fifth year, the city continuously assesses and reviews its policies, procedures, and programs to improve the effective and efficient delivery of its grant programs. There is a continued need for CDBG funds to fulfill objectives in all the above categories hence no changes are recommended based on Somerville's experiences.

The City pursued all potential resources indicated in the Consolidated Plan by working with developers, non-profits, and other government agencies to leverage a variety of funds for affordable housing projects and programs, opportunities for low- and moderate-income people to become homeowners, assistance to homeless persons, public service programs, job training and education, community development activities directed toward revitalizing neighborhoods and economic development. In this fifth program year, the city continued to wind down its COVID-related special programming and return to its original pre-planned portfolio of activities.

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

No

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

CR-50 - HOME 24 CFR 91.520(d)

Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations

Please list those projects that should have been inspected on-site this program year based on the schedule in 24 CFR §92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

There were 15 Activities (273 units) requiring reinspections during the reporting period. There were 96 (35%) inspections completed. Five of the units needed minor repairs, such as replacing missing window screens, replacing doorknobs, and fixing exhaust fans in the bathrooms. The property owners/managers were notified of the repairs, and they made the necessary repairs, and reinspections were performed. All the properties that required inspections were completed.

Attached is a list of properties currently being monitored.

List of Properties Inspected

Properties	Months Inspected
75 Cross Street	October
VOA Somerville Veterans	October
Mystic Waterworks Apartments	October
110 Walnut	December
Kent St.	December
Linden St.	December
CASCAP Somerville Place	December
18-20 Illinois Ave.	August
Richdale Inc/WalnutStCtr- Jackson Rd Group Home	January
VNA Lowell Street	January
St. Polycarp Phase 2	March
Mary's Trust	April
VNA Conwell Capen	April
Clarendon Hill Towers	April
Union Square Apts.	May
109 Gilman St.	June
St. Polycarp Phase 1	June

Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 24 CFR 91.520(e) and 24 CFR 92.351(a)

Under the regulations of the HOME Program and in furtherance of the City of Somerville's commitment to non-discrimination and equal housing opportunity, the Office of Strategic Planning and Community Development has established the following policies to affirmatively market units in rental and homebuyer projects containing five (5) or more HOME-assisted housing units (the "Covered Units").

It is the Affirmative Marketing Policy of OSPCD to assure that individuals who normally might not apply for available housing units without special outreach be informed of available units, be encouraged to apply, and have an equal opportunity to rent or own the available housing units being offered.

The Policy covers the following areas:

1. Methods for the Division to use to inform the public, potential tenants, and potential owners about federal fair housing laws and affirmative marketing policies and procedures.
2. Requirements and practices each Beneficiary of a HOME-funded housing project with Covered Units must follow to carry out the Division's Policy.
3. Procedures to be used by Beneficiaries to inform and solicit applications from persons in the housing market area who are not likely to apply for housing without special outreach.
4. Records that will be kept describing actions taken by the Division and Beneficiaries to affirmatively market Covered Units and records to assess the results of these actions.
5. Description of how the Division shall assess the success of affirmative marketing actions and what corrective actions shall be taken.

The City's CHDO and other developers commit to doing affirmative outreach in marketing all HOME-Assisted units. Homeowners participating in the Housing Rehabilitation program with properties containing five or more Home-Assisted rental units are required to affirmatively market these vacant units.

Refer to IDIS reports to describe the amount and use of program income for projects, including the number of projects and owner and tenant characteristics

Program income for PY2022 was used to fund 7 activities including the Tenant Based Rental Assistance program and 6 unique closing cost assistance activities. The majority of closing cost assistance activities are used in conjunction with the city's inclusionary program and 2022 closing cost assistance was also made available to qualifying buyers of the units at the 7 Summer St. Acquisition property.

Describe other actions taken to foster and maintain affordable housing. 24 CFR 91.220(k) (STATES ONLY: Including the coordination of LIHTC with the development of affordable housing). 24 CFR 91.320(j)

CR-58 – Section 3

Identify the number of individuals assisted and the types of assistance provided

Table 14 – Total Labor Hours

Total Labor Hours	CDBG	HOME	ESG	HOPWA	HTF
Total Number of Activities	0	0	0	0	0
Total Labor Hours					
Total Section 3 Worker Hours					
Total Targeted Section 3 Worker Hours					

Table 15 – Qualitative Efforts - Number of Activities by Program

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers					
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the-job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.					
Technical assistance to help Section 3 business concerns understand and bid on contracts.					
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including drafting resumes, preparing for interviews, finding job opportunities, and connecting residents to job placement services.					
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.					

Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, and transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four-year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents in obtaining financial literacy training and/or coaching.					
Bonding assistance, guarantees, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

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

ESG Supplement to the CAPER in *e-snaps*

For Paperwork Reduction Act

1. Recipient Information—All Recipients Complete

Basic Grant Information

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

ESG Contact Name

Prefix	
First Name	Alan
Middle Name	
Last Name	Inacio
Suffix	
Title	Director of Finance and Administration

ESG Contact Address

Street Address 1	93 Highland Avenue
Street Address 2	
City	Somerville
State	MA
ZIP Code	-
Phone Number	6176256600
Extension	2539
Fax Number	
Email Address	ainacio@somervillema.gov

ESG Secondary Contact

Prefix	Ms.
First Name	Julie
Last Name	Melgar
Suffix	
Title	Program Compliance Officer
Phone Number	6176256600
Extension	
Email Address	jmelgar@somervillema.gov

2. Reporting Period—All Recipients Complete

Program Year Start Date 07/01/2022
Program Year End Date 06/30/2023

3a. Subrecipient Form – Complete one form for each sub-recipient

Subrecipient or Contractor Name: CATHOLIC CHARITIES
City: SOMERVILLE
State: MA
Zip Code: 02143,
DUNS Number: 092189950
UEI:
Is the sub-recipient a victim services provider: N
Subrecipient Organization Type: Other Non-Profit Organization
ESG Subgrant or Contract Award Amount: 21125

Subrecipient or Contractor Name: SOMERVILLE HOMELESS COALITION
City: SOMERVILLE
State: MA
Zip Code: 02144,
DUNS Number: 847408804
UEI:
Is the sub-recipient a victim services provider: N
Subrecipient Organization Type: Other Non-Profit Organization
ESG Subgrant or Contract Award Amount: 116000

Subrecipient or Contractor Name: RESPOND
City: Somerville
State: MA
Zip Code: 02143, 0007
DUNS Number:
UEI:
Is the sub-recipient a victim services provider: Y
Subrecipient Organization Type: Other Non-Profit Organization
ESG Subgrant or Contract Award Amount: 63702

CR-65 - Persons Assisted

4. Persons Served

4a. Complete Homelessness Prevention Activities

Table 16 – Household Information for Homeless Prevention Activities

Number of Persons in Households	Total
Adults	60
Children	29
Don't Know/Refused/Other	0
Missing Information	0
Total	89

4b. Complete for Rapid Re-Housing Activities

Table 17 – Household Information for Rapid Re-Housing Activities

Number of Persons in Households	Total
Adults	0
Children	0
Don't Know/Refused/Other	0
Missing Information	0
Total	0

4c. Complete for Shelter

Table 18 – Shelter Information

Number of Persons in Households	Total
Adults	151
Children	8
Don't Know/Refused/Other	0
Missing Information	0
Total	159

4d. Street Outreach

Table 19 – Household Information for Street Outreach

Number of Persons in Households	Total
Adults	294
Children	1
Don't Know/Refused/Other	0
Missing Information	0
Total	295

4e. Totals for all Persons Served with ESG

Table 20 – Household Information for Persons Served with ESG

Number of Persons in Households	Total
Adults	505
Children	38
Don't Know/Refused/Other	0
Missing Information	0
Total	543

5. Gender—Complete for All Activities

Table 21 – Gender Information

	Total
Male	0
Female	0
Transgender	0
Don't Know/Refused/Other	0
Missing Information	0
Total	0

6. Age—Complete for All Activities

Table 22 – Age Information

	Total
Under 18	0
18-24	0
25 and over	0
Don't Know/Refused/Other	0
Missing Information	0
Total	0

7. Special Populations Served—Complete for All Activities

Number of Persons in Households

Table 23 – Special Population Served

Subpopulation	Total	Total Persons Served – Prevention	Total Persons Served – RRH	Total Persons Served in Emergency Shelters
Veterans	0	0	0	0
Victims of Domestic Violence	0	0	0	0
Elderly	0	0	0	0
HIV/AIDS	0	0	0	0
Chronically Homeless	0	0	0	13
Persons with Disabilities:				
Severely Mentally Ill	0	0	0	0
Chronic Substance Abuse	0	0	0	0
Other Disability	0	0	0	0
Total (Unduplicated if possible)	0	0	0	0



CR-70 – ESG 91.520(g) - Assistance Provided and Outcomes

10. Shelter Utilization

Table 24 – Shelter Capacity

Number of New Units – Rehabbed	
Number of New Units – Conversion	
Total Number of beds - Nights available	
Total Number of beds - Nights provided	
Capacity Utilization	

11. Project Outcomes Data measured under the performance standards developed in consultation with the CoC(s)

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CR-75 – Expenditures

11. Expenditures

11a. ESG Expenditures for Homelessness Prevention

Table 25 – ESG Expenditures for Homelessness Prevention

	Dollar Amount of Expenditures in Program Year		
	2020	2021	2022
Expenditures for Rental Assistance	26,317	0	3,048
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	0	0
Expenditures for Housing Relocation & Stabilization Services - Services	0	0	0
Expenditures for Homeless Prevention under the Emergency Shelter Grants Program	0	0	0
Subtotal Homelessness Prevention	26,317	0	3,048

11b. ESG Expenditures for Rapid Re-Housing

Table 26 – ESG Expenditures for Rapid Re-Housing

	Dollar Amount of Expenditures in Program Year		
	2020	2021	2022
Expenditures for Rental Assistance	0	0	0
Expenditures for Housing Relocation and Stabilization Services - Financial Assistance	0	62,394	0
Expenditures for Housing Relocation & Stabilization Services - Services	0	0	0
Expenditures for Homeless Assistance under Emergency Shelter Grants Program	0	0	0
Subtotal Rapid Re-Housing	0	62,394	0

11c. ESG Expenditures for Emergency Shelter

Table 27 – ESG Expenditures for Emergency Shelter

	Dollar Amount of Expenditures in Program Year		
	2020	2021	2022
Essential Services	0	0	0
Operations	82,874	116,743	0
Renovation	0	0	0
Major Rehab	0	0	0
Conversion	0	0	0
Subtotal	82,874	116,743	0

11d. Other Grant Expenditures

Table 28 - Other Grant Expenditures

	Dollar Amount of Expenditures in Program Year		
	2020	2021	2022
Street Outreach	0	0	9,004
HMIS	0	0	0
Administration	3,823	0	0

11e. Total ESG Grant Funds

Table 29 - Total ESG Funds Expended

Total ESG Funds Expended	2020	2021	2022
30	113,014	179,137	12,052

11f. Match Source**Table 30 - Other Funds Expended on Eligible ESG Activities**

	2020	2021	2022
Other Non-ESG HUD Funds	0	0	0
Other Federal Funds	0	0	0
State Government	0	0	0
Local Government	0	0	0
Private Funds	0	0	0
Other	0	0	0
Fees	0	0	0
Program Income	0	0	0
Total Match Amount	0	0	0

11g. Total**Table 31 - Total Amount of Funds Expended on ESG Activities**

Total Amount of Funds Expended on ESG Activities	2020	2021	2022
	113,014	179,137	12,052