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Fifth Program Year CAPER

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

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

GENERAL

Executive Summary

Program Year 5 CAPER Executive Summary response:

The Year 5 Action Plan provided the basis and strategy for the use of federal funds granted to the City of Medford by the U.S. Department of Housing and Urban Development (HUD) under the Community Development Block Grant (CDBG) program. The plan identified proposed objectives and outcomes for the fifth program year of the Five Year Consolidated Plan, for the period of July 1, 2009 through June 30, 2010. The City of Medford received \$1,752,284.00 in CDBG funds, an increase of \$26,654.00 from the prior year. This CAPER will provide an assessment of the City's progress on meeting those goals and objectives along with describing the use and distribution of funds.

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

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

Public service programs provided a range of services for Medford residents including legal aid, food pantry and meals, referral and counseling services, services for the elderly, elementary after-school care, as well as vocational, social, recreational and educational opportunities for intellectually disabled residents and their families.

This year the City implemented successful programs utilizing funds awarded through the American Recovery and Reinvestment Act of 2009 (ARRA). The

City received \$716,681.00 for Homelessness Prevention and Rapid Re-housing Program (HPRP) to target those at risk of homelessness and those who are already experiencing homelessness and need temporary assistance to obtain and retain housing. Through June 30, 2010, forty-nine households received assistance through this program, with \$153,777.76 expended with an additional \$150,000.00 committed for the continued service to these households. The City also received \$468,454.00 in CDBG Recovery Act (CDBG-R) funds for a Neighborhood Infrastructure Improvement Program, expending \$316,024.59 for street reconstruction projects, which were completed in December 2009.

The City made progress and exceeded its goals in affordable housing production of owner and rental units by leveraging its planning and housing administrative expertise to negotiate unit production using private and HOME funds through the North Suburban HOME Consortium. The use of downpayment assistance by Medford residents, leveraged ARRA first-time homebuyer downpayments, and exceeded program goals.

Though the City actively sought a qualified administrative partner for a housing rehabilitation program, they were unable to find one. However, a project is well underway to provide handicapped accessible wheelchair ramps at Walkling Court, an elderly/disabled public housing development. This project is planned for completion in the fall of 2010. In Year 36, reallocation of \$150,000.00 is planned for flooring installation to preserve affordable housing of 144 units at Walkling Court, a state elderly/disabled public housing development.

Two Historic Preservation projects were completed this year. The first completed the final phase of rehabilitation at the Shepherd Brooks Estate to restore the West Porch, an effort that has been in progress for several years. The second project was to complete planning work for the restoration of the historic Salem Street Burying Ground in Medford Square.

Several street, sidewalk and infrastructure improvements are near completion and are planned for completion in the fall of 2010. The CDBG-R funded street reconstruction project, mentioned above, was completed in December 2009.

Working with the Massachusetts Development Finance Agency the City completed a feasibility study for the Medford Square Parking Garage and a Massachusetts Opportunity Relocation and Expansion (MORE) grant was obtained for the design of the garage, which will facilitate the creation of new jobs in the square. Progress has been made in the implementation of the Medford Square Master Plan, using leveraged city and federal funds. The City continues to work with the Massachusetts Bay Transportation Authority (MBTA) and the Federal Transit Administration (FTA) to secure construction funds for the project.

Phase 1 of Mystic River Reservation on Route 16 in Medford (referred to as Condon Shell Park) was completed; this includes installation of an accessible pathway system, parking, landscaping, a canoe launch and interpretive signs, utilizing HUD Economic Development Initiative (EDI) funds.

The River's Edge project is now well underway, together with the cities of Everett and Malden. In Year 4, the City obtained a Section 108 loan of \$1,000,000.00 for this project, which is paid by the City of Everett from a BEDI grant. This year \$119,956.90 was disbursed with a total disbursement to date of \$994,000.00.

The City's long-term goal, relative to the River's Edge project Section 108 loan, is to create 42 jobs in Medford, with 51% (21.5 jobs) made available to low or moderate income individuals. Monitoring is conducted by the Mystic Valley Development Commission (MVDC). As of June 30, 2010, 11 jobs were created, 8 of which were taken by low or moderate income persons. Office buildings opened at 200 River's Edge Drive, with Marriott International executing a 7-year lease for 32,000 square feet of the building. Marriott has moved in and anticipates bringing up to 100 jobs to the area.

Within the River's Edge project, construction was also completed on a 222-unit residential apartment building with the building 90% leased and 75% occupied as of June 30, 2010. Thirty-four units are designated for residents earning up to 120% of median income. While not meeting HUD criteria for affordable housing, these units are available at below market rate. In addition, construction on a 5,000 square foot commercial building and design of the Air Force Road/Norman Street Reconstruction Project are ongoing.

General Questions

Program Year 5 CAPER General Questions response:

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

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

The City of Medford received \$1,752,284.00 in federal Community Development Block Grant funds for its thirty-fifth program year (July 1, 2009 to June 30, 2010) as well as \$16,374.90 in Program Income. According to regulations governing the program, activities shall be undertaken so that at least 70% of the funds benefit the City's low and moderate income citizens. Projects that do not meet the low and moderate income criteria must either aid in the elimination of slums or blighted conditions or meet an unexpected urgent need. While public services that benefit low and moderate income persons are eligible activities, no more than 15% of funds can be used to support public services.

The City expended \$2,236,633.09 in CDBG funds during the reporting period. Additionally, the City accomplished an 89.82% low and moderate income benefit during this period. When combined with the prior two year's low and moderate income benefit, the total for the three-year reporting period is 92.26% low and moderate benefit.

HOME Program funds expended during the reporting period of \$436,086.43 included \$150,000.00 for an affordable rental unit, \$200,000.00 for eight homeownership units, \$60,000.00 for downpayment assistance and \$26,086.43, representing approximately 43% of the Affordable Housing Specialist's salary, which was reimbursed to the City by the NSC.

The City also expended \$469,802.35 of ARRA funds. CDBG-R funds of \$316,024.59 were expended for a Neighborhood Infrastructure Improvement program. A total of \$153,777.76 was expended for Homelessness Prevention and Rapid Re-Housing Programs (HPRP), with an additional \$150,000.00 committed for the continued service to existing clients.

The City's objectives for the use of CDBG funds in 2009-2010 from the annual Action Plan are presented below.

The following is an assessment of fulfilling goals and objectives.

HOUSING

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

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

The following summarizes the City's goals and objectives for housing expenditures, with proposed versus actual accomplishments and provides

specific detail on housing related activities. The City has exceeded its goals and objectives for the year.

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

Objective #1: Housing Preservation, Decent Housing

A primary housing objective was to preserve the existing housing stock, whether it was already subsidized by government agencies, such as the Medford Housing Authority, or whether it was affordable to households with low or moderate incomes. Though the City actively sought a qualified administrative partner for a housing rehabilitation program, they were unable to find one. However, a project is well underway to provide handicapped accessible wheelchair ramps at Walkling Court, an elderly/disabled housing development, enabling all residents the opportunity to remain active and have safe access to their homes. This project is planned for completion in the fall of 2010.

Objective #2 – Affordable Housing Production, Decent Housing

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

In Year 5, five affordable rental units were completed at 75 Station Landing. The lottery took place July 27, 2009.

In Year 5, eight affordable homeownership units were produced. All eight units were occupied this fiscal year. Seven of the eight households received downpayment and closing cost assistance through the North Suburban HOME Consortium First-time Homebuyers program.

Additionally another household received downpayment and closing cost assistance for a market rate condominium.

In Year 5, Medford Community Housing, Inc. (MCH) acquired a two-bedroom condominium at 305 Riverside Avenue, using \$5,000.00 of Community Development Block Grant funds, \$150,000.00 of HOME funds and \$35,000.00 in private financing sources. This was MCH's first rental project and the unit was rented to a low income household.

The Affordable Housing Specialist assisted the Medford Community Housing board with organizational development, the evaluation of sites and other activities aimed at increasing production. The City continues to work with other local affordable housing developers such as Heading Home, Inc., Tri-CAP and Housing Families, Inc. to identify sites for affordable housing development to serve very low to extremely low income families.

Objective #3 – Homeownership, Decent Housing

The City of Medford supported homeownership for low and moderate income households through participation in the North Suburban HOME Consortium's First-time Homebuyers program. This program provides \$7,500.00 - \$9,000.00 in downpayment and closing cost assistance, access to the Soft Second Mortgage through the State's Department of Housing and Community Development (DHCD), and the certified First-time Homebuyers program. Winners of affordable housing lotteries in Medford can also received first-time homebuyer's assistance through these programs. Seven low to moderate income households, who occupied affordable homeownership units at the Lincoln Kennedy School, received this assistance. One additional low to moderate income household received downpayment and closing cost assistance for the purchase of 17 Woodrow Avenue, Unit 1. The City, working with the NSC, offered the First-time Homebuyers seminars. Over 125 households participated in these classes held at Medford City Hall in August, November and March.

Accomplishments

Community Development Block Grant
Housing Objectives
Year 35

July 1, 2009 – June 30, 2010

Objective #1: Housing Preservation, Decent Housing

Preserve and improve the quality of the existing housing stock.

Table 1: Housing Preservation, Decent Housing

<u>Program/ Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<p><u>Housing Rehabilitation</u> Financial assistance to low and moderate income households for owner-occupied and multi-family housing, through low-interest or deferred loans or grants</p> <p>Improvements to include: weatherization, lead paint abatement, correction of building code violations</p>	14A Single Family Rehab	No funds expended	<p>Proposed: Increase in rehabilitated and lead abated housing units occupied by low and moderate income families.</p> <p>No rehab done in this year. Actively sought qualified administrative partner but were unable to find one.</p> <p>Housing funds of \$150,000.00 planned reallocation in Year 36 for flooring installation to preserve affordable housing of 144 units at Walkling Court, a state elderly/disabled public housing development. Balance housing funds: \$246,291.98</p>

Objective #2: Affordable Housing Production, Decent Housing

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

Table 2: Affordable Housing Production, Decent Housing

<u>Program/ Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<p><u>Nonprofit Affordable Housing Development:</u> Financial Assistance to a community housing organization for affordable housing development costs</p>	14G Acqui- sition	\$5,000 HOME \$150,000 Private funds \$35,000	<p>Proposed: The development of at least 2 units of permanently affordable owner housing.</p> <p>The City worked with Medford Community Housing to acquire a condominium, creating 1 new affordable rental unit.</p>

<p>Affordable housing development: Assist with or oversee the progression of housing lotteries at the nonprofit or for profit development, resulting in affordable housing</p>		<p>No CDBG funds expended</p> <p>HOME \$200,000</p>	<p>Proposed: Create owner and rental housing for at least 5 affordable units that may be created with private or public funds.</p> <p>The City held a lottery and sold 8 units at the Lincoln Kennedy School, creating 8 new affordable ownership units, increasing the supply of affordable housing.</p> <p>The City oversaw a lottery for 5 units at 75 Station Landing. Five new affordable rental units were created and are occupied by low to moderate income households.</p>
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Objective #3: Homeownership, Decent Housing

Increase and encourage homeownership for moderate income households.

Table 3: Homeownership, Decent Housing

Program/ Activity Description	IDIS Matrix Code	CDBG Funding Expended	Proposed vs. Actual Accomplishments
<p>Downpayment Assistance: Participate in North Suburban HOME Consortium ADDI-funded downpayment assistance program</p>		<p>No CDBG funds expended</p> <p>HOME \$60,000</p>	<p>Proposed: Assist 5 low or moderate income households in purchasing homes</p> <p>Assisted 8 moderate income households to become homeowners.</p>
<p>First-time Homebuyer: Participate in North Suburban HOME Consortium ADDI-funded first-time homebuyers program</p>		<p>No CDBG funds expended</p>	<p>Over 125 households attended first-time homebuyers program held in Medford.</p>

The City achieved overall objectives in the area of affordable housing and was quite successful.

HISTORIC PRESERVATION

24 CFR 570.202(d)

In Year 5, eligible CDBG rehabilitation activities at the Shepherd Brooks Estate to restore the West Porch were completed with a total expenditure of \$177,946.00 in CDBG funding. Planning work for the restoration of the historic Salem Street Burying Ground in Medford Square was also completed utilizing \$17,590.00 in CDBG funds and an additional \$15,000.00 in leveraged state funds.

PHYSICAL IMPROVEMENTS TO CITY SYSTEMS AND PUBLIC FACILITIES

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

The City sought to reconstruct its infrastructure, public facilities, water, sewer, drainage, sidewalk, and roadway facilities and improve public housing and community facilities. Handicapped accessibility projects were also accomplished so basic services may be efficiently provided to its citizenry. In Year 35, \$1,043,986.00 was allocated for physical improvements. Expenditures included \$1,465,633.70 of CDBG funds and \$316,024.59 of CDBG-R funds.

The City's water, sewer, sidewalk, and street systems were upgraded and replaced, where necessary. Work on Hancock and Lyman Avenues and Orchard Street is well underway and expected to be completed by fall 2010. Design was completed and reconstruction of Bow Street, Revere Place and Kilsyth Road is 85 percent finished with completion planned for fall of 2010.

The City also received \$468,454.00 in CDBG Recovery Act (CDBG-R) funds for a Neighborhood Infrastructure Improvement Program, expending \$316,024.59 for street reconstruction projects, on Mayberry, Wheeler and Willard Avenues and Strathmore Road. This project was completed in December 2009.

Public housing improvements included the reconstruction of handicapped accessible wheelchair ramps at Walkling Court, an elderly/disabled housing development. This project is well underway with completion planned for fall 2010. This new handicap accessibility ensures that all residents have the opportunity to remain active and have safe access to their homes.

Funding appropriated for Senior Center physical improvements was not expended. The project was deferred while the Director of Elder Affairs defines a long range plan of Senior Center improvements.

1. The following assesses proposed versus actual accomplishments.

Objective #1 - Suitable Living Environment

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

Table 4: Physical Improvements

<u>Program/ Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<p><u>Historic Preservation</u> West Porch at Shepherd Brooks Estate</p>	16B	\$195,536.03	<p>Proposed: Reconstruction of historic resource, remove slums and blight.</p> <p>Two Historic Preservation projects were completed this year. The first completed the final phase of rehabilitation at the Shepherd Brooks Estate to restore the West Porch. The second was to complete a plan for restoration of the historic Salem Street Burying Ground in Medford Square.</p>
<p><u>Water, Sewer, Drainage, Street, Sidewalk, Signal Improvements.</u> Upgrade and replace street systems including water, sewer, drainage, lead service connections, sidewalks, traffic signals, trees and landscape improvements.</p>	03K	<p>CDBG \$1,465,633.70</p> <p>CDBG-R \$316,024.59</p>	<p>Proposed: Improve living conditions in designated low and moderate income neighborhoods. Reconstruction and improvements on Revere Place, Kilsyth Road and Bow Street.</p> <p>Improvements are underway and are near completion on 6 roadways: Revere Place, Kilsyth Road, Hancock and Lyman Avenues and Bow and Orchard Streets.</p> <p>CDBG-R: The City received \$468,454.00 in CDBG Recovery Act (CDBG-R) funds for a Neighborhood Infrastructure Improvement Program, expending \$316,024.59 for street reconstruction projects, on Mayberry, Wheeler and Willard Avenues and Strathmore Road. This project was completed in December 2009.</p>

<p>Public Facility Projects Restoration of Medford Housing Authority developments for elderly and low income residents.</p> <p>Improve energy efficiency at Senior Center by upgrading heating system and identifying other energy related improvements.</p>	<p>03</p> <p>03A</p>	<p>No funds expended</p> <p>No funds expended</p>	<p>Proposed: Increase safety and improve living conditions for low income households. 851 units planned for improvement.</p> <p>Handicapped accessible wheelchair ramps are being installed at the Walkling Court elderly/disabled housing development. This project is well underway and planned for completion in fall 2010.</p> <p>Proposed: Conduct energy audit. Identify necessary improvements and costs. Begin construction as funding allows.</p> <p>The Senior Center is on a state waiting list to conduct an energy audit. Construction plans are on hold during this evaluation.</p>
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The City’s expenditures were consistent with proposed accomplishments anticipated for the 35th program year.

ECONOMIC DEVELOPMENT

24 CFR 570.201(c)/570.208(b)

The City’s goal for the program year is to revitalize areas to create employment and to increase the tax base.

The commitment to expand economic opportunities and community well being continues.

Medford Square

The City signed an agreement with the Massachusetts Department of Housing and Urban Development and a new restaurant business to secure the release of a Massachusetts Opportunity Relocation and Expansion (MORE) for the design of a parking garage, which will facilitate the creation of new jobs in Medford Square.

The original grant of \$1,000,000.00 was reduced to \$800,000.00 due to financial difficulties at the State. Working with the Massachusetts Development Finance Agency and their consultant team the City has completed a feasibility study for the parking garage and is preparing to engage an architect and an owner’s project manager to move ahead with the next phase of project design. The City continues to work with the

Massachusetts Bay Transportation Authority (MBTA) and the Federal Transit Administration (FTA) to secure construction funds for the project.

The City has made progress in the implementation of the Medford Square Master plan, utilizing leveraged city funds. Using approximately \$165,000.00 in municipal linkage funds the City retained a consultant team of traffic engineers and environmental specialists who worked with the Massachusetts Department of Transportation and the City to develop plans and specifications for the realignment of Clippership Drive. The project was bid in spring 2010 and is currently under construction. Construction is being funded through a 2006 federal earmark for \$900,000.00 and \$1,000,000.00 in ARRA funds. The project will be completed in 2010.

Implementation of this project will result in the creation of a ½-acre parcel of land with 1000 feet of riverfront access in the Square, handicapped accessible sidewalks, ramps and crosswalks, decorative lighting, storm water improvements, parking and landscaping. This phase of the project will follow with additional handicapped accessible improvements and a waterfront park. The City has secured \$707,904.00 in funding for a feasibility study for construction of a water taxi dock and service.

The City also made considerable progress in the redevelopment of the Mystic River Reservation on Route 16 in Medford (referred to as Condon Shell Park). The City secured a total of \$693,000.00 in EDI special projects funding in 2006 for the renovation and development of an outdoor theatre/park on the bank of the Mystic River in the western quadrant of Medford Square. In 2007, the City engaged a consultant team, to prepare a master plan for the area. This includes the new theater and concession area, landscape and parking improvements, as well as links to the downtown business area, connections along the rivers and additional parks within the square.

The City utilized EDI and City funds on design and contract administration and the first phase of project development is currently under construction with a current contract price of \$446,000.00. This involves parking improvements, pathways, environmental and planting improvements as well as construction of a canoe launch, installation of benches, signage and a storm water management system. The City has also secured a \$40,000.00 grant from the Massachusetts Environmental Trust for installation of interpretive signage at the site. This will be installed as part of the phase 1 construction project, which will be completed by September 2010. The construction cost for the entire facility is estimated to be approximately \$3.5 million and additional leveraged funds are currently being sought from state and federal sources in order to move forward with additional phases of the project.

River's Edge

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

Designed in the spirit of "Smart Growth", guided by the Mystic Valley Development commission (MVDC) and developed by Preotle Lane and Associate, River's edge is being developed in three phases. This project is now well underway, together with the cities of Everett and Malden. In Year 4, the City obtained a Section 108 loan of \$1,000,000.00 for this project, which is paid by the City of Everett from a BEDI grant. This year \$119,956.90 was disbursed with disbursements to date of \$994,000.00.

The City's long-term goal, relative to the River's Edge project Section 108 loan, is to create 42 jobs in Medford, with 51% (21.5 jobs) made available to low or moderate income individuals. Monitoring of job creation is conducted by the Mystic Valley Development Commission (MVDC). Using self-reporting forms, modeled on the HUD model, the MVDC requests job creation reports from all tenants of River's Edge semi-annually. As of June 30, 2010, eleven jobs were created, eight (72.7%) of which were taken by low or moderate income persons. Thus, the City is making progress towards achieving its long-term job creation goal.

Phase 1 was accomplished from 2009 – 2010 with an office building opening at 200 River's Edge Drive. This building received LEED Gold certification from the US Green Building Certification. Marriott International has executed a 7-year lease for 32,000 square feet of the building, has moved in and hopes to bring up to 100 jobs to the area.

Construction was also completed on a 222-unit residential apartment building and as of June 30, 2010, the building was 90% leased and 75% occupied. The project includes 34 affordable units designated for residents earning up to 120% of median income. While not meeting HUD criteria for affordable housing, these units are available at below market rate.

Additionally construction is ongoing on a 5,000 square feet commercial building at 359 Commercial Street, on land owned by the MVDC within the project area.

Design of the Air Force Road/Norman Street Reconstruction Project is ongoing and is being funded with HUD Section 108 funds from Everett. The roadway will provide access to a 40-acre parcel located in Phase 2 in Everett. Berkley Investments, the owners of this land initiated the permitting phase for the River Green Technology Park, a 500,000 square foot multi-use industrial, office, R&D center suitable for green technology and other uses incorporating sustainable design elements. Phased development is planned

with construction of a public, multi-use path and scenic overlook connecting an existing Everett park to the Malden River waterfront. The design will mirror that of the Park at River’s Edge constructed as part of Phase 1.

The MVDC received two separate grants from the Massachusetts Environmental Trust for work along the river. These amounted to \$325,000.00, with \$150,000.00 funding the Wellington Greenway, a multipurpose path along the river, and \$175,000.00 going towards preparation of plans and specifications for the Army Corp’s Malden River Ecosystem Project, which involves wetland and river habitat restoration. The MVDC also received a \$300,000.00 Brownfields Assessment Grant from the U.S. EPA, to conduct environmental assessments in Phases 2 and 3 of the River’s Edge project. The City, together with the Cities of Everett and Malden, has a \$1,000,000.00 Section 108 loan for the River’s Edge project, being paid by the City of Everett from a BEDI grant.

Objective #1 - Creating Economic Opportunities

Revitalize existing commercial centers by supporting economic development activities.

Table 5: Economic Development

<u>Program/Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>Medford Square</u> Revitalize area through infrastructure investments, public facilities, parks, parking improvements and public/private partnerships for housing and commercial development.	17D	No CDBG funds expended	Proposed: Begin revitalization of civic and commercial areas via leveraging private funds, developing a job creation plan, realign Clippership Drive, and identify a parking facility project. Funds leveraged from private sources. (long-term, multi-year objective) Began revitalization of Medford Square using leveraged funds, including realignment of Clippership Drive, phase 1 construction of Condon Shell Park and completion of the parking garage feasibility study.

<u>Program/Activity Description</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Expended</u>	<u>Proposed vs. Actual Accomplishments</u>
<u>River's Edge</u> Redevelop an under-utilized Brownfield site.	17D	Section 108 loan 119,956.90 (994,000.00 to date)	Proposed: Draw Section 108 funds. Complete Phases 1 and 2, revitalization of 30-acre site. Funds leveraged from private sources. (long term, multi-year objective) Significant progress made on multi-year revitalization project with \$119,956.90 disbursed in YR 5. Leveraged private funds. Objective achieved.
<u>Storefront Improvement Program</u> Financial incentives for facade rehabilitation in deteriorating business areas throughout the city.	17D	No funds expended	2 Proposed 0 completed.

The City did not achieve its Storefront objective. While no CDBG funds were expended, the City met its goals in Medford Square and River's Edge leveraging private and other sources of public funds to achieve objectives.

PUBLIC SERVICES

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

Objective #1 – Suitable Living Environment

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

The City sought to provide a variety of public service programs by allocating \$258,844.00 for various public services. During the reporting period, \$254,706.60 was expended.

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

Arc of East Middlesex (Association for Retarded Citizens): \$6,000.00 in CDBG funds were leveraged with \$35,080.00 of fundraising and services to provide support services for Medford persons with intellectual disabilities and their families. Social and recreational activities such as track and field, special Olympic training and trips, dances for participants aged 13-23, music therapy, and vocational camps were offered this program year. A very successful teen support program was started in Medford at the West Medford Community Center. Arc also provided workshops, support groups, training, information and referrals to their clients and families. Seventy-one persons, the majority with low incomes, benefited from CDBG funding.

Bread of Life provides emergency meals, food pantry, clothing and furniture assistance to homeless and needy families. Thousands of meals and meal equivalents were served this year, with meals being offered every Tuesday through Friday evening. Free clothing is also available during the evening meal. A weekly food pantry is also available. An estimated 314 Medford residents were served. This total includes holiday meals served and meals that are delivered to shut-ins during the Easter/Passover, Thanksgiving and Christmas holidays. Bread of Life also offers counseling, outreach, advocacy and referral services to this population. Bread of Life has expanded their

outreach to homeless families displaced to area motels. \$1,350.00 of CDBG funds was expended by this program, leveraged with \$50,000.00 of private funds.

The Community Family, Inc. utilizes CDBG funds to provide financial assistance to adult Medford residents with Alzheimer's disease who require dementia-specific adult day services at the Buddy Coholan Memory Loss Center in Medford. The program prevents the unnecessary or premature nursing home placement of adults with memory disorders and improves the quality of life for participants and their families. The multifaceted program consists of nursing care, social work services, a therapeutic activities program, socialization, rehabilitative care, daily nutrition and personal care services. The Medford center program provides critical respite services for primary caregivers. Three elders were assisted this year with a total of \$2,250.00 in CDBG funds. \$10,000.00 in other funds was raised with various fundraisers.

The Medford Consumer Advisory Commission leveraged \$9,000.00 in CDBG funds with \$35,500.00 in funds from the State Attorney General's Office and the City to provide consumer mediation, referral and education services to Medford residents. The Advisory Commission offers advice to consumers and mediation services on landlord/tenant rights, discrimination and labor complaints, contracts, credit related problems and any large or small business transactional disputes. Senior citizens, minorities and low income residents are the highest percentage of the public who are targeted by frauds. The Consumer Advisory program makes concerted outreach efforts to inform less educated lower income populations of consumer protection rights in dealing with fraudulent businesses. Throughout the year, the Consumer Advisory program has been able to assist 379 persons including 175 female heads of households and 210 minority persons. Findings are reported to the Attorney General's Office for review and further action if necessary.

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

our seniors. A Volunteer Coordinator was also funded to maximize volunteer assistance to the programs. CDBG funds, in the amount of \$52,352.23 were expended to service approximately 1,139 Medford seniors during this program year.

Immigrant Learning Center expended \$5,000.00 in CDBG funds to assist non English speaking persons by offering a continuum of English As A Second Language classes to all levels of students so they can lead productive lives in the U.S. Fifty-four Medford residents were able to participate in these classes.

Medford Family Life/Heading Home, Inc. expended \$5,000.00 in CDBG funds to assist homeless families with temporary housing and case management services. The services provided include life skills/parenting support and housing search assistance to help them to become self-sufficient by building skills for successful participation in the community. Once the family moves into independent housing, weekly workshops, referrals for community-based services, and follow-up support are provided. Twenty-one Medford residents were provided with temporary housing and support services.

The Medford Housing Authority expended \$16,380.00 in CDBG funds to provide security patrol services at the Walkling Court, an elderly/disabled housing development. This development consists of approximately four and one-half acres and nine separate buildings, with a total of 18 entrances. This situation makes existing and traditional security measures considerably less effective than at other developments, thereby necessitating security patrol services. Elderly and disabled persons of low income received the benefit of security patrol services to help ensure that their residences were kept safe and secure in addition to the decent and sanitary housing services that are traditionally provided by the Housing Authority. This security program has been successful in alleviating some of the fears expressed by the residents and has probably prevented more severe and frequent security issues. CDBG funds benefited 132 low to moderate income people, 61 being female heads of households.

Medford Public Schools After-School Childcare serves the need of low to moderate income families requiring quality and affordable after school and vacation care. After-school programs are available at the Brooks, Columbus, McGlynn and Roberts Elementary Schools. \$11,712.00 in CDBG funds assisted 16 Medford families, 12 being female headed households, by providing much needed quality after school care for families that may otherwise not be able to it. This program also links the school-day curriculum to the after school program by providing homework assistance and dedicated homework time for children attending the after school program.

Mystic Valley Elder Services operates a transportation program for elders over 62 years of age who require travel assistance to critical medical appointments such as dialysis, chemotherapy, and radiation therapy. It also provides for those who require chair car service to medical appointments and day care. This is an important service for families with no means to transport a wheelchair bound elder. Also, due to the frequency of the medical treatments, transportation is extremely expensive for individuals to purchase privately and it becomes difficult for family, friends or volunteers to provide all the required trips. A total of \$10,800.00 in CDBG funds were expended on this program benefiting thirteen Medford residents, four female head of households. This program provided 624 rides throughout the year.

The Salvation Army operates the Emergency Services Program, which provides emergency financial assistance with rent, utilities, food and clothing allowances. The social worker provides budget counseling, crisis intervention, referrals and advocacy for Medford residents. The program's goal is the alleviation and management of financial crisis for Medford, Malden, and Everett residents. \$1,500.00 in CDBG funds benefited fourteen Medford residents, all of whom were extremely low income. Five of these residents were female heads of households. CDBG funds were leveraged by approximately \$10,000.00 in funds from other sources.

SCM Community Transportation Inc. provides transportation for Medford's senior and mobility-impaired residents. SCM continued its medical dial-a-ride transportation, as well as its service to the Council on Aging Congregate Meals program, and the Elliot Club for the Handicapped. SCM transportation continues to provide needed transportation services to our elderly and disabled populations promoting greater self-sufficiency and independence. SCM provided services to 373 seniors, expending \$104,292.48 in CDBG funds.

Triangle, Inc. provides an Adult Day Health program that serves aging individuals, diagnosed with Alzheimer's disease and frail elders, or those with dementia, enabling them to maintain the greatest degree of independence possible. Program services include case management services, day care, socialization, medical support and nutrition for aging individuals. The program seeks to prevent or delay the need for nursing home admissions and provides respite for family members who are serving as caregivers. \$3,000.00 in CDBG funds assisted three Medford residents. These funds leveraged over \$200,000.00 in other funding sources to provide much needed transportation to the day health facility.

Tri-City Community Action Program, Inc. (Tri-CAP) serves the needs of low income clients of Medford, who cannot afford legal representation, by locating local attorneys in private practice who are willing to provide legal representation free of charge. Using these 'panel attorneys', individuals who otherwise would not have legal representation are able to appear in court with a competent advocate representing their legal rights. \$7,200.00 in

CDBG funds was expended for the Pro Bono Legal Project (PBLP) that provides a wide range of legal services in the areas of housing, family law, bankruptcy law, consumer law and Social Security Disability. Tri-CAP, working in partnership with Mediation for Results, provides alternative dispute resolution between landlords and tenants in an effort to resolve tenancy problems before they progress into eviction problems. The Pro Bono Legal Project places a particular emphasis on cases that have the potential to have a significant impact on the lives of low income people. For that reason, the PBLP prioritizes cases in which families might become homeless, lose income, or suffer abuse. Two hundred thirty Medford residents benefited from this activity, eighty-eight of whom were female heads of households. CDBG funds were leveraged with approximately \$143,392.00 from other public sources to fund the salaries of the Pro Bono Coordinator and Specialist.

West Medford Community Center provides an increasing number of elderly services programs each year. Attendance at the senior lunch program increased and outreach to the Haitian community, now providing a Haitian meal choice, was very successful. Other activities held were a computer class, yoga, knitting, book club, blood pressure, games and cards as well as various medical presentations. These programs provide meaningful social and recreational activities for Medford seniors. \$18,869.89 of CDBG funds was expended for the Elder Services Director, who directs the current programs that benefitted 135 Medford seniors.

Accomplishments

Community Development Block Grant
Public Services Programs
Year 35

July 1, 2009 – June 30, 2010

Table 6: Public Services Programs

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<u>Arc of East Middlesex</u> Recreation and social programs for intellectually disabled Medford residents and their families.	050	\$6,000 Funded \$6,000 Expended	Provided 71 intellectually disabled Medford residents and their families with a variety of recreational, social and therapeutic support programs. All residents were provided with the services they requested. Goals exceeded.	Increased access to and use of community recreational activities and resources for intellectually disabled residents and their families. Decreased isolation for these residents and their families.
<u>Bread of Life</u> Emergency Food Pantry services provided to all needy individuals in the Tri-City Area. Free cooked meals are provided 4 days a week. Holiday food baskets and coupons are distributed to needy families.	05	\$1,350 Funded \$1,350 Expended	Provided nutritious meals and meal equivalents to 314 Medford residents. Provided food baskets and food coupons to local supermarkets for the holidays. Goals exceeded.	Low income residents in need receive nutritious meals and food pantry supplies. Reduce hunger through counseling, referrals and outreach. Improve the quality of life for low income families and individuals.
<u>Consumer Advisory</u> Advocacy program offers consumers advice and complaint mediation services on landlord/tenant issues, discrimination and labor complaints, credit problems and business transactions.	05C	\$9,000 Funded \$9,000 Expended	Provided 379 individuals and seniors with consumer advice or mediation services. Goals exceeded.	Helped to decrease consumer fraud especially with elderly and low income residents. Increased consumer savings in business, credit situations, and landlord/tenant issues.

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<p><u>Council on Aging</u> The Council on Aging provides services to senior citizens: home maintenance program, recreational day trips, nutritional shopping transportation, exercise program and Senior Center volunteer coordinator.</p>	05A	\$59,094 Funded \$52,352 Expended	Provided approx. 1139 seniors with safety-related simple home maintenance, nutritional shopping transportation, drop-in center transportation, exercise program and a volunteer coordinator. Lack of interest in the exercise program and an absence of the home maintenance provider contributed to reduced spending for these activities. Goals met.	Improved quality of life and safety for seniors. Provided a suitable living environment in their homes. Reduced feelings of isolation. Enhanced nutrition and overall health, safety and welfare. Increased access and use of community resources for seniors
<p><u>Immigrant Learning Center</u> A continuum of English As A Second Language classes is made available to all levels of students so they can lead productive lives in the U.S.</p>	05	\$5,000 Funded \$5,000 Expended	Fifty-four (54) Medford residents were able to participate in these classes. Goals exceeded.	Improved quality of life for people who do not speak English. Provide accessibility to services.
<p><u>Medford Family Life Education/Heading Home, Inc.</u> Assists homeless families with temporary housing and case management services.</p>	05	\$5,000 Funded \$5,000 Expended	Provided 21 Medford residents with temporary housing and support services. Goals exceeded.	Continued support services for Medford residents to facilitate successful transition to permanent homes to prevent homelessness. Provided suitable living environment.
<p><u>Medford Housing Authority</u> Provided security patrol services at Walkling Court, an elderly/disabled housing development.</p>	05A	\$16,380 Funded \$16,380 Expended	Provided 132 seniors with security patrol services at the Walkling Court elderly/disabled housing development. Goals met.	Improved and increased the sense of security and safety for seniors in the neighborhood. Provided a suitable living environment for senior residents.

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
<p><u>Medford Public Schools After-school Childcare</u> Assists families with the cost of after-school care expenses at the Brooks, Columbus, McGlynn and Roberts Elementary Schools.</p>	05L	<p>\$11,712 Funded</p> <p>\$11,712 Expended</p>	<p>Provided 16 families with financial assistance for after school care. With so many families on the waiting list, we were able to allocate unused funds to this service. Exceeded goals.</p>	<p>Increased service to families, to provide a safe and enriching environment for children while parents work providing stability in the households. Provide accessibility to services.</p>
<p><u>Mystic Valley Elder Services</u> To provide transportation for critical medical appointments and day care for seriously ill or disabled residents.</p>	05A	<p>\$10,800 Funded</p> <p>\$10,800 Expended</p>	<p>Provided medical transportation and day care rides to 13 Medford residents. Services were provided to all that requested transportation. Goals met.</p>	<p>Provided support for critically ill or disabled seniors, by assisting families to support these seniors. Provide accessibility to services.</p>
<p><u>Salvation Army Emergency Service Program</u> To provide emergency financial assistance and budget counseling in crisis situations.</p>	05Q	<p>\$1,500 Funded</p> <p>\$1,500 Expended</p>	<p>Provided emergency financial assistance and counseling to 14 extremely low income individuals in need. Goals exceeded.</p>	<p>Increased support and hope for extremely low income families and individuals. Sustained living environment.</p>
<p><u>SCM Transportation</u> To provide transportation to Medford’s senior or mobility-impaired residents.</p>	05A	<p>\$104,558 Funded</p> <p>\$104,292 Expended</p>	<p>Provided 373 elderly and disabled people with much needed transportation. 9,337 Dial-A-Ride units were provided which exceeded the goals.</p>	<p>Increased accessibility to recreational, social and medical services to sustain good health and prevent isolation and loneliness.</p>
<p><u>Triangle, Inc. The Adult Day Health Program</u> To provide aging and intellectually disabled persons with case management and nursing support services.</p>	05B	<p>\$3,000 Funded</p> <p>\$3,000 Expended</p>	<p>Provided 3 aging, intellectually disabled individuals with a supportive day program, to delay or prevent nursing home care. Goals met.</p>	<p>Increased support for individuals and families to delay or prevent nursing home care. Increased much needed relief for the primary caregiver to assist them in continuing at home</p>

<u>Agency Program/Activity Description Goals</u>	<u>IDIS Matrix Code</u>	<u>CDBG Funding Inputs</u>	<u>Proposed versus Actual Accomplishments</u>	<u>Proposed Outcomes</u>
				care.
<u>Tri-CAP Pro Bono Legal Project</u> To provide free legal services to low income Medford residents for civil law cases.	05C	\$7,200 Funded \$7,200 Expended	Provided free legal advice and services to 230 low and moderate income individuals and families in civil law cases. Accomplishments exceeded.	Reduction in the number of homeless adults and families. Prevention of involuntary dislocation of low income families and individuals with disabilities.
<u>West Medford Community Center</u> Elders provided with a lunch program, exercise program, health screening clinics and recreational activities.	05A	\$20,000 Funded \$18,970 Expended	135 Medford seniors participated in the programs offered. Additional programs and services are continuing to be added. Outreach to the Haitian community was accomplished with the addition of a Haitian meal choice. Exceeded goals.	Increased accessibility to programs and services for West Medford seniors.

PLANNING AND ADMINISTRATION

The City managed the CDBG program and activities summarized in this report in an efficient manner, leveraging outside resources when possible. A total of \$315,756.76 was expended on planning and administration, representing 18.02 percent of the allocation for this program year.

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

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

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

The City of Medford has relied on its update to the Analysis to Impediments to Fair Housing to identify and address impediments to fair housing choice.

The City has moved forward this year to hire a contractor and to identify, expand on, and complete a new Analysis to Impediments document. A Request for Proposals has been advertised and the City is in the process of interviewing candidates.

Impediment: Need for additional outreach to local bankers & realtors and the community regarding Fair Housing rights and responsibilities

Actions taken:

- The City has an annual process instituted to educate agencies, residents, bankers, and realtors of the City's commitment to fair housing. These notices and brochures, made available in five languages, explain the laws, citizen's rights, and how to report housing discrimination.
- The City demonstrated its commitment to Fair Housing information and education by running its annual Fair Housing advertisement in the local newspaper.
- The City hosted a 'free' comprehensive Fair Housing training that addressed principles of Fair Housing, who is served by Fair Housing, benefits to the community, types of discrimination, protected classes, steps to affirmatively furthering Fair Housing, and strategies for persons with disabilities. This also included the Analysis of Impediments and how to best gather pertinent information, and look at residence preference versus fair housing. This training was sponsored by the Office of Human Diversity and the Human Rights Commission. The City expanded its outreach to include bankers, realtors, and local agencies, as well as opened up this training to all consortium members. This training was provided by staff of the Boston Metro Housing Partnership and was attended by our HUD representative.

Actions planned:

- Education of city residents on Fair Housing issues will be broadened by posting notices in various languages throughout the city.
- The City will expand its Fair Housing outreach by including its annual Fair Housing advertisement in a local non-English newspaper.
- The City will continue monthly collaborations with other area cities, as well as local, state, federal, and regional housing rights organizations to respond to housing trends and issues that may negatively affect City residents, especially those of color and with limited English capabilities.

Impediment: Need for additional information and outreach to newcomer populations and individuals with disabilities

Actions taken:

- The City demonstrated its commitment to Fair Housing education to its limited English speaking residents by outreach efforts in five languages.
- Welcome Booklets were created and distributed in four languages. A welcome message from the Mayor is included, as well as information on a multitude of topics designed to assist newcomers in navigating City services.
- The City purchased and distributed a booklet 'What Every Immigrant Needs to Know'. This booklet helps newcomers understand the cultural nuances, clarifies bureaucratic confusion, and helps individuals adapt to their new community. The booklet's housing section explains finding housing, renting, leasing, or buying housing, housing discrimination, and being a good neighbor.
- The City held a regional forum for persons with disabilities. We coordinated with the Disability Policy Consortium and Massachusetts Office on Disability to address issues affecting persons with disabilities where we could also bring forward best practices. As a result of this effort, an email discussion group offering assistance and ideas to these individuals has been ongoing. There have been multiple opportunities to attend forums and share ideas on a variety of topics.
- The City continues to verify accessibility for barrier removal by personal site visits to ensure full access.
- The City once again reviewed and updated its Language Access Plan (LAP).

Actions planned:

- The City needs to market Fair Housing education for residents with limited English capabilities. The City will meet with various organizations that work with limited English populations to get feedback on improving this outreach.
- The City will expand its distribution of both its 'Welcome Booklet' and the booklet 'What Every Immigrant Needs to Know' to better assimilate our newcomer population.
- The City will continue to encourage and offer informational forums to address barriers faced by individuals with disabilities.

Impediment: General City Education & Outreach Efforts

Actions taken:

- The Diversity Director attended the Analysis to Impediments webcast in Boston at the HUD office. At this event, the idea of creating a regional Fair Housing forum (which was held in November) was conceived.
- The Diversity Director attended a discrimination forum put on by Massachusetts Commission Against Discrimination.
- The 'Welcome Brochures' in multiple languages and Fair Housing information is available on the City website.
- The Human Rights Commission and the Disability Commission coordinated efforts to once again hold a 'Spring Into Access' information fair for all Medford residents. Approximately thirty federal, state, and local agencies provided information on rights and the process for accessing information and assistance.

Actions planned:

- The City will continue to provide information and assistance to its residents. We hope to increase outreach to our limited English speaking residents.
- The City will review, update, and expand its current outreach listing.

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

The Human Rights Commission and Disability Commission have begun meeting together, to better understand each other's issues, as well as collaborate on individual rights issues that affect all people. Together all individuals should better understand each other's issues.

The City hosted a regional information session to be better informed on Chapter 40B issues. The Citizens' Housing and Planning Association Director conducted an informational forum, which educated those present, and prompted many communities to publicly support 40B projects.

The City of Medford continues to reach out and assist minority owned (MBE) and women owned (WBE) businesses. Annually we update, reach out, and encourage their interaction with the City.

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

5. Leveraging Resources

- a. Identify progress in obtaining “other” public and private resources to address needs.
- b. How Federal resources from HUD leveraged other public and private resources.
- c. How matching requirements were satisfied.

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

The Medford Historical Commission received a \$15,000.00 matching grant for use on the Historical Preservation project at the Salem Street Burying Ground.

Medford Square has leveraged significant commitments from state government including \$ 800,000.00 for the construction of a parking facility in Medford Square under the job creation program, MORE. The River’s Edge project utilized a variety of state, federal and private resources as well as resources from a variety of academic institutions in the area. Street projects leveraged approximately \$106,675.00 in municipal sources for related construction and resident engineering services.

The affordable housing development projects leveraged \$436,086.43 in HOME funds, while the HOME First-time Homebuyers program leveraged ARRA funds to facilitate the increase in home ownership.

Managing the Process

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

Program Year 5 CAPER Managing the Process response:

The Office of Community Development continues to provide quality management and oversight as directed by the HUD Field representatives, and continues to address compliance issues, improve spending, monitor staff time and hire and train staff to better fulfill objectives and monitor sub-recipients. The CDBG Administrator continues the financial management, contract compliance and reporting and monitoring functions of the office. The Affordable Housing Specialist continues to identify and pursue housing opportunities and resolve housing issues in the City, while increasing the

production of affordable units. The Economic Development Planner continues to review the conditions of neighborhoods and buildings in areas of the City, identifying plans for use of CDBG funds to upgrade the City's residential and commercial areas. Public hearings, citizen participation in not only hearings but at the planning and project level, all continue to enrich the CDBG process and program.

Citizen Participation

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

Program Year 5 CAPER Citizen Participation response:

1. Public hearings for the City's Action Plan for this thirty-fifth program year were held on March 10, 2009, March 11, 2009, April 14, 2009 and April 16, 2009. Verbal citizen comments were expressed regarding their continued support of public service programs and several voiced their reliance on transportation programs so they can receive necessary medical care, food shop and meals. Input was received by seniors, residents of public housing and public service agencies and beneficiaries at the meeting at the Senior Center. No formal citizen comments were received during the planning and reporting process.

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

2. RESOURCES AVAILABLE AND GEOGRAPHIC DISTRIBUTION

Resources available to the City included \$1,752,284.00 in CDBG funds, \$16,374.90 in program income from repayment of housing loans, and \$26,086.43 for reimbursement of salary costs through the HOME program. A total of \$2,236,633.09 was expended of which \$315,756.76 was for planning and administration.

In addition, \$1,185,135.00 was awarded to the City through the American Recovery and Reinvestment Act of 2009 (ARRA): \$716,681.00 for Homelessness Prevention and Rapid Re-housing Program(HPRP) and \$468,454.00 for Community Development Block Grant Recovery (CDBG-R). During this program year, \$153,777.76 was expended for HPRP (another \$150,000.00 is committed for continued service to existing clients) and \$316,024.59 was expended for CDBG-R.

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

- **Medford Square (Tract 3391)** - Direct services were provided at the Senior Center. Planning work for the restoration of the historic Salem Street Burying Ground in Medford Square was completed. 3.7% of expenditures were made in this area.
- **Brooks Estates (Tract 3392)** - The Shepherd Brooks Estate received funding to complete the stabilization of the West Porch. 9.3% of expenditures were made in this area.
- **West Medford (Tract 3393)** - West Medford is a significantly diverse neighborhood with relatively high density. The area is home to 30% of the City's African American residents and the neighborhood itself is 34.44% African American. The neighborhood also is home to a small population of Hispanic residents (4.2% of neighborhood population). West Medford includes a Block Group (#1) with 59 percent of its residents within low and moderate income guidelines. With the recent completion of the West Medford Community Center, which expended a large percent of funding in previous years, this year 1% of funding was expended for elderly social services at the West Medford Community Center.
- **Hillside (Tract 3394 and 3395)** - Hillside is an older, concentrated residential area with 65% of the housing stock built pre-1939. Approximately 37.9% of expenditures were made in this neighborhood. Projects included a new water main and street and sidewalk reconstruction at Hancock and Lyman Avenues and Orchard Street. Also, security services were provided at the Walkling Court elderly/disabled public housing development.
- **South Medford (Tract 3396 and 3397)** - Projects included roadway and water main reconstruction of Bow Street and Kilsyth Road. 39.3% of expenditures were in this neighborhood.
- **Wellington (Tract 3398)** - The Wellington area has a mix of residential, commercial and industrial land uses. Two block groups in this tract have a high low and moderate income percentage.

Community Development Block Grant funds, HOME funds and private financing were used to acquire a two-bedroom condominium, creating one new affordable rental unit. Less than 1% of expenditures were in this neighborhood.

- **Citywide (as noted above)** – The balance of expenditures, 8.7%, were on public services which were administered citywide to eligible persons.

A map is included illustrating geographic distribution.

Institutional Structure

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

Program Year 5 CAPER Institutional Structure response:

The City has strengthened its role with private entities to meet its goals and objectives in particular working with private developers and a local CHDO to produce housing. Efforts are continuing with nonprofits to purchase and renovate small multi-family rental properties. Capacity building of small, public service providers, with a particular emphasis on outreach to minorities, has also been a focus and staff has educated themselves to provide support to such agencies.

Monitoring

Program Year 5 CAPER Monitoring response:

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

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

Construction Projects: The Massachusetts Building Codes and local zoning and subdivision requirements were followed with close cooperation between appropriate City officials and professional consultants. Public

procurement is conducted with the guidance of the Chief Procurement officer. Davis-Bacon compliance is done in-house with the assistance of other departments as needed. Construction is monitored on-site on a daily basis by a clerk of the works or inspector. Weekly project team meetings, including architects, contractors, city officials and on-site clerk of the works or inspector, are held to track progress and resolve issues.

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

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

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

Economic Development projects continue to be monitored for job creation with the City exceeding its goals.

3. Self Evaluation

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

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

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

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

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

Activities included increasing affordable home ownership opportunities, making public housing improvements, upgrading essential infrastructure systems, roadway and park improvements in Medford Square and initial planning work on the Medford Square Parking Garage. These are detailed in relevant sections of the report.

The Medford Housing Authority continues to provide improvements to public housing; handicapped accessible wheelchair ramps are being installed at the Walkling Court elderly/disabled housing development, City streets, sidewalks and water and sewer systems were reconstructed. The North Suburban HOME Consortium managed the process of providing downpayment and closing cost homeownership assistance to Medford residents, as well as first-time homebuyers workshops.

Historic Preservation was accomplished with renovations to the Shepherd Brooks Estate West Porch and evaluation and planning work on the Salem Street Burying Ground.

- d. Indicate any activities falling behind schedule.
All activities were on schedule.

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

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

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

Indicators that best describe results include the ability of individuals to access transportation, meals and health services, and the number of feet of sidewalk, streets, water and sewer utilities installed (3 street projects were completed), and the appearance of facilities upgraded. Two Historic Preservation project were completed to address Slums and Blight conditions.

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

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

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

Major goals such as increasing the supply of affordable housing are on target. Public service goals are on target. The provision of infrastructure improvements is on target. The elimination of slums and blight and the creation of an economic development program utilizing federal funds are limited.

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

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

Lead-based Paint

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

Program Year 5 CAPER Lead-based Paint response:

In Year 5, 13 newly constructed, restricted housing units were created. Additionally one existing unit was acquired and made into restricted affordable housing creating two affordable ownership units. The Affordable Housing Specialist also attended HUD sponsored Lead-based Paint training.

HOUSING

Housing Needs

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

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

Program Year 5 CAPER Housing Needs response:

The City made considerable progress on housing production and use of downpayment assistance by Medford residents. Private funds and initiatives were leveraged as much as possible to reduce the burden on the federal budget while streamlining the process.

As a member community of the North Suburban HOME Consortium (NSC), Medford assisted eight first-time homebuyers with the HOME Downpayment Assistance program. In addition, 125 families completed first-time homebuyers workshops. NSC also provided counseling to all homebuyers through this program, both before and after their purchase.

In Year 5, Medford had lotteries and a total of 13 restricted units were occupied; five were rental units and eight were homeownership units. The five rental units were developed at 75SL, located at Stations Landing. A lottery was held and all five units are currently occupied by low to moderated

households. The eight affordable homeownership units were developed as part of a fifty- unit condominium development. A lottery took place on February 11, and all units were closed by June 30, 2010. Because the closings were completed by June 30, these households were also eligible to receive \$8,000.00 federal tax credit through the ARRA program.

Additionally, Medford Community Housing, Inc. acquired its first rental property, a two-bedroom condominium that is now occupied by a low income household.

Working with the NSC, the use of downpayment assistance and attendance at first-time homebuyers seminars have increased during this program year. These efforts will continue.

The Affordable Housing Specialist monitored foreclosure status of units within the City of Medford and will continue this effort into the new program year, to stay informed and help determine how programs may be implemented to reduce foreclosure.

The City managed rehabilitation loans for 28 households. Seven of these loans provided monthly mortgage payments totaling \$6,650.12 while the other 21 are deferred - due when the home transfers ownership. During Year 5, two deferred loans were paid off, for \$9,724.78. The total returned to Medford was \$16,374.90, which will be used to fund future housing projects.

The Affordable Housing Specialist also continued to provide technical assistance to Medford Community Housing to explore future development and funding opportunities. She was also an active participant in the North Suburban HOME Consortium (NSC) and Malden-Medford Continuum of Care (CoC) meetings.

The City of Medford submitted a Substantial Amendment to the Consolidated Plan 2008 Action Plan for the Homelessness Prevention and Rapid Re-housing Program (HPRP), which increased homelessness resources in the City. The Affordable Housing Specialist is a member of the CHAPA Homeless committee, which meets bi-monthly to discuss the use of HPRP funds and other funding sources to help very low income households.

Medford also participates in Community Housing Conversations with Metropolitan Boston Housing Partnership. These meetings enable the City to collaborate efforts of the people who serve Medford residents every day, as well as provide input regarding their needs. Information sharing to keep current on available programs for Medford residents is also achieved.

The City of Medford received \$716, 681.00 in Homelessness Prevention and Rapid Re-housing Program (HPRP) funds from the U.S Department of Housing and Urban Development (HUD) through the American Recovery and Reinvestment Act of 2009. Through a competitive RFP in August of 2009,

these funds were awarded to four nonprofit organizations: Tri-City Community Action Program \$400,000.00, Heading Home \$146,000.00, Housing Families Inc. \$84,486.00 and Mediation for Results \$15,000.00. This money will help Medford families and individuals that are homeless obtain stable housing and will help those at-risk of homelessness remain housed. Through June 30, 2010, 49 households were served with case management and financial assistance.

Specific Housing Objectives

Program Year 5 CAPER Specific Housing Objectives response:

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

In total, for Year 5, Medford assisted in the creation of thirteen new affordable restricted units of rental or ownership housing and assisted eight households in acquiring downpayment and closing cost assistance to purchase, exceeding the goals for the year. In addition, 125 households completed a first-time homebuyers workshop held in Medford City Hall.

Housing Results

Table 7: Housing Results

Downpayment Assistance for First-time homebuyers (HOME)							
Address	Amount	Number of Units	Household Size	Race	Income	Elderly	Disabled
17 Woodrow, Unit 1	\$7,500	1	1	white	between 50-80 AMI	N	N
215 Harvard Street Unit 11	\$7,500	1	3	white	between 50-80 AMI	N	N
215 Harvard Street Unit 16	\$7,500	1	4	asian	between 50-80 AMI	N	Y
215 Harvard Street Unit 18	\$7,500	1	2	white	between 50-80 AMI	N	N
215 Harvard Street Unit 24	\$7,500	1	1	white	between 50-80 AMI	N	N
215 Harvard Street Unit 28	\$7,500	1	1	white	between 50-80 AMI	N	N
215 Harvard Street Unit 30	\$7,500	1	1	asian	between 50-80 AMI	N	N
215 Harvard Street Unit 41	\$7,500	1	1	white	between 50-80 AMI	N	N
Total	\$60,000	8	14				

<u>Affordable Ownership Production of Units</u>							
<u>Address</u>	<u>Amount</u>	<u>Number of Units</u>	<u>Household Size</u>	<u>Race</u>	<u>Income</u>	<u>Elderly</u>	<u>Disabled</u>
215 Harvard Street Unit 8		1	3	white	between 50-80 AMI	N	N
215 Harvard Street Unit 11		1	3	white	between 50-80 AMI	N	N
215 Harvard Street Unit 16		1	4	asian	between 50-80 AMI	N	Y
215 Harvard Street Unit 18		1	2	white	between 50-80 AMI	N	N
215 Harvard Street Unit 24		1	1	white	between 50-80 AMI	N	N
215 Harvard Street Unit 28		1	1	white	between 50-80 AMI	N	N
215 Harvard Street Unit 30		1	1	asian	between 50-80 AMI	N	N
215 Harvard Street Unit 41		1	1	white	between 50-80 AMI	N	N
TOTAL		8	16				

<u>Affordable Production of Rental Units</u>							
<u>Address</u>	<u>Amount</u>	<u>Number of Units</u>	<u>Household Size</u>	<u>Race</u>	<u>Income</u>	<u>Elderly</u>	<u>Disabled</u>
75 SL Unit 112		1	2	white	less than 50%	N	N
75 SL Unit 215		1	1	white	less than 50%	N	Y
75 SL Unit 220		1	1	white	between 50-80 AMI	N	N
75 SL Unit 224		1	1	asian	less than 50%	Y	N
75 SL Unit 320		1	1	white	between 50-80 AMI	N	Y
Total		5	6				

**Affordable Acquisition of Rental Unit
By Medford Community Housing**

305 Riverside Drive Unit 2-1	\$5,000 CDBG	1	3	asian & white	less than 50%	N	N
	\$150,000 HOME						
Total		1	3				

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

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

Both homeownership and rental goals were exceeded.

3. Describe efforts to address "worst-case" housing needs and housing needs of persons with disabilities.

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

Medford residents also benefit from our partnership with the cities of Malden and Everett in an Emergency Services committee. Under this partnership, we are able to provide emergency assistance for families who have fallen behind in their rent or mortgage payments or who cannot afford their heating or cooling bills. Tri-CAP receives funding from multiple sources for this assistance and can provide up to \$1,000.00 to households who can show that they will be able to manage their finances after receiving the emergency funding. The City also awarded \$1,500.00 in Block Grant funds to the Salvation Army for the provision of emergency services to Medford residents.

The City supports the pilot program being initiated by some area nonprofits to create a one-stop housing help line in order to better connect families with existing services. The program is planned for implementation in the upcoming program year. Medford will participate in a process to analyze data that emerges from the help line in order to identify and address gaps in services.

Medford is aware that the strong housing market of the early 2000's has resulted in an acute housing crisis that cannot be fixed overnight. Over time,

the City aims to create more units of housing to serve lower income households and to continue supporting the range of social service organizations that provide assistance to our lowest income residents, including those who are disabled.

The City plans to continue this evaluation to determine the needs of the community and develop an appropriate strategy to stem the tide of foreclosures in the City.

Through the use of Homelessness Prevention and Rapid Re-housing funds, the City has stabilized 49 households that were experiencing housing instability due to the economic downturn. In addition, the City worked with nonprofit housing providers that would purchase foreclosed properties to prevent dislocation of tenants.

Public Housing Strategy

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

Program Year 5 CAPER Public Housing Strategy response:

The City of Medford seeks to improve the conditions and provide suitable living environments for low income residents of public housing developments by funding public housing modernization that ensures a safe environment for residents.

The Medford Housing Authority (MHA) attempts to establish realistic goals in relation to the needs and objectives of its community, as well as the available financial and staffing resources of the Authority, both for the coming program year and the near future. MHA's immediate objective is to maintain, protect and improve the quality of the living environment for its current residents, and to provide a physical plant, financial policies and management structure, which will enable the Authority to continue to offer quality housing to its residents.

During Year 5, the MHA received the following CDBG funding for public housing improvements. Security services at Walking Court, in response to increased crime levels were funded with \$16,380.00 and \$25,000.00 was appropriated for new handicapped accessible wheelchair ramps at Walkling Court, an elderly/disabled housing development.

The Medford Housing Authority has ongoing needs to rehabilitate public housing, improve housing authority infrastructure and provide services to its residents. At present, MHA has identified almost \$2 million worth of high-priority physical improvements for which it seeks federal and state funds. There is a high priority on the resident safety, therefore, new flooring within

apartments and boiler replacements are scheduled for the state-aided family development. A priority set for this year is to convert from electric heat to gas heat at the elderly federal development at 121 Riverside Avenue, and install solar hot water heating panels for that building. Additionally MHA is in the process of Federalizing the 150-unit family development at Willis Avenue, and the 75-unit elderly development at 35 Bradlee Road.

Expenditures are estimated at \$1 million for modernization improvements to state-aided public housing and \$1.8 million for capital fund physical improvements to federally-aided public housing.

The state-aided developments have a priority for homeless persons under an emergency priority category subject to regulations of the Massachusetts Department of Housing and Community Development.

The Medford Housing Authority encourages resident participation through resident membership on its Governing Board, and through regularly scheduled monthly meetings with resident representatives. MHA meets at least annually with a Resident Advisory Board to prepare its Annual Plan and has regularly scheduled monthly meetings with residents representing each housing development.

Barriers to Affordable Housing

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

Program Year 5 CAPER Barriers to Affordable Housing response:

In Year 5, the City of Medford increased its outreach to realtors and bankers to inform them of the downpayment and closing cost assistance available to low and moderate income households. This resulted in over 125 families participating in an 8-hour first-time homebuyers class in this fiscal year.

The City provided limited translation of some information, such as how to access a Spanish first-time homebuyers class.

The greatest barriers to affordable housing are housing costs, increasing cost of living, reduced access to financing and growing unemployment.

HOME/American Dream Downpayment Initiative (ADDI)

1. Assessment of Relationship of HOME Funds to Goals and Objectives
 - a. Evaluate progress made toward meeting goals for providing affordable housing using HOME funds, including the number and types of households served.

2. HOME Match Report
 - a. Use HOME Match Report HUD-40107-A to report on match contributions for the period covered by the Consolidated Plan program year.
3. HOME MBE and WBE Report
 - a. Use Part III of HUD Form 40107 to report contracts and subcontracts with Minority Business Enterprises (MBEs) and Women's Business Enterprises (WBEs).
4. Assessments
 - a. Detail results of on-site inspections of rental housing.
 - b. Describe the HOME jurisdiction's affirmative marketing actions.
 - c. Describe outreach to minority and women owned businesses.

Program Year 5 CAPER HOME/ADDI response:

1. Assessment of Relationship of HOME Funds to Goals

Medford's goal was to assist four low or moderate income households in purchasing a home in Year 5. We far exceeded that goal, helping eight households in the purchase of their first home with ADDI funds. Each household received \$7,500.00 - \$9,000.00 in HOME funds, for a total of \$60,000.00 coming to Medford for homeownership assistance.

2 – 4. HOME Reports

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

HOMELESS

Homeless Needs

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

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

Program Year 5 CAPER Homeless Needs response:

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

The City of Medford is an active participant in the Tri-City Continuum of Care Homeless Task Force that in 2009 secured \$1,454,322.00 in McKinney Continuum of Care funding. With these funds, the CoC provided one year of renewal funding to:

- Two permanent housing projects, providing thirty-one units of permanent supportive housing for homeless individuals and families (Homeless to Housing; Homeless to Housing Expansion),
- One transitional housing program for seven homeless families (Medford Family Life),
- One transitional housing program for eleven homeless individuals (Kaszanek House),
- A supportive services program, the Tri-City Mobile Homeless Outreach Team, serving 161 homeless individuals annually.

McKinney 2009 funds were used to create two new permanent supportive housing programs. These are:

- Stepping Stones Expansion-- four units of scattered site permanent housing with intensive case management for chronically homeless individuals,
- Disabled Family Leasing—seven two- and three-bedroom apartments and clinical case management for homeless families with a disabled head of household.

With McKinney funding secured in previous years, the Malden-Medford Continuum of Care (CoC) was able to complete the renovation of 115 Washington Street, an 11-unit SRO building. Seven of these units designated for chronically homeless individuals. Another project, Stepping Stones, is a five-unit permanent supportive housing project, which began operation in January 2008. Stepping Stones provides affordable housing and intensive case management for chronically homeless individuals.

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

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

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

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

The CoC has seen a number of its transitionally housed families and individuals secure permanent housing through its own permanent housing

programs – Homeless to Housing, Homeless to Housing Expansion, and Stepping Stones Expansion (35 units).

The CoC also assists chronically homeless households in accessing mainstream resources such as housing authority units and Section 8 mobile vouchers. It is also working to create new permanent housing units for chronically homeless individuals – such as the project at 115 Washington Street with 11 SRO units. Furthermore, it assists with career and job training in order to move chronically homeless households towards independence and permanent housing free of subsidy.

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

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

Table 8: McKinney 2009 Continuum of Care

HUD-defined CoC Name:* Malden-Medford CoC						CoC #: MA-513				
(1) SF-424 Applicant Name	(2) Project Sponsor Name	(3) Project Name	(4) Priority	(5) Requested Project Amount (actuals)	(6) Term	(7) Program and Component Type				
						SHP New	SHP Renewal	S+C New	S+C Renewal	
Heading Home, Inc.	Heading Home, Inc.	Tri-City Stepping Stones 3	1	\$ 69,869	1		x			
Housing Families Inc.	Housing Families Inc.	Disabled Family Leasing-1	2	\$127,234	1		x			
Heading Home, Inc.	Heading Home, Inc.	Homeless to Housing	3	\$474,503	1		x			
Heading Home, Inc.	Heading Home, Inc.	Homeless to Housing Expansion	4	\$ 67,662	1		x			
Heading Home, Inc.	Heading Home, Inc.	Medford Family Life	5	\$216,409	1		x			
Tri-City Community Action Program	Tri-City Community Action Program	Kaszanek Transitional House	6	\$183,961	1		x			
Tri-City Community Action Program	Tri-City Community Action Program	Mobile Homeless Outreach Team	7	\$175,964	1		x			
Malden Housing Authority	Malden Housing Authority	Tri-City Shelter+Care	8	\$138,720					x	
Total CoC Amount Received:				\$1,454,322						

Specific Homeless Prevention Elements

1. Identify actions taken to prevent homelessness.

Program Year 5 CAPER Specific Housing Prevention Elements response:

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

In August of 2009, a competitive RFP process was employed to award HPRP funds to four nonprofit organizations: Tri-City Community Action Program \$400,000.00, Heading Home \$146,000.00, Housing Families Inc. \$84,486.00 and Mediation for Results \$15,000.00. These funds assisted Medford families and individuals that were homeless to obtain stable housing, and helped those at-risk of homelessness remain housed.

HPRP funds can be used for rent and utility arrears, security deposits, short-term rental assistance, utility payments, housing search and placement. These HPRP program funds have already assisted 49 Medford families.

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

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

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

Emergency Shelter Grants (ESG)

Program Year 5 CAPER ESG response:

The City of Medford was not a recipient of ESG funds during the program year.

COMMUNITY DEVELOPMENT

Community Development

Program Year 5 CAPER Community Development response:

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

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

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

This information is provided in Table 7: Housing Results, on Page 37.

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

All CDBG funds were used to benefit low and moderate income people. Table 7: Housing Results, starting on page 37, breaks down the housing benefits by income group, while IDIS reports provide this information for public services.

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

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

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

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

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

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

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

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

4. For Funds Not Used for National Objectives

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

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

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

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

Not Applicable. The River's Edge project created eleven new jobs, eight of which were taken by low or moderate income persons.

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

No non-public service expenditures were made based on serving the LMC population. Concerning public services, non- presumed eligible, low and moderate income clientele are serviced through agencies, reported on quarterly and annual reports to the OCD and subject to monitoring.

8. Program income received

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

The Housing Rehabilitation fund received program income of \$16,374.90; monthly mortgage payments totaled \$6,650.12 and two mortgage payoffs totaled \$9,724.78.

b. Detail the amount repaid on each float-funded activity.

The City did not have any float-funded activities.

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

All loan repayments were for Housing Rehabilitation and are broken down in (a) above.

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

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

9. Prior period adjustments – where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:

- a. The activity name and number as shown in IDIS;
- b. The program year(s) in which the expenditure(s) for the disallowed activity(ies) was reported;
- c. The amount returned to line-of-credit or program account; and
- d. Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

The City did not have any such adjustments.

10. Loans and other receivables

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

The City did not have any float-funded activities.

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

The City holds six active Housing Rehabilitation loans with a combined principal balance of \$89,883.83. Two loans, with a principal balance of \$9,724.78, were paid off during this program year.

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

The City holds 21 deferred Housing Rehabilitation loans with a combined principal balance of \$385,471.00. The terms of these deferred loans are

that they are given interest-free, and that the principal balance is owed to the City when the property transfers to a new owner.

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

No loans were written off or forgiven.

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

No parcels were purchased.

11. Lump sum agreements

Not applicable.

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

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

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

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

Antipoverty Strategy

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

Program Year 5 CAPER Antipoverty Strategy response:

In Year 5, the City of Medford employed a range of strategies to reduce the financial burdens of families living in poverty and to assist such families in being able to focus on moving out of poverty. Strategies included:

- Funding social service programs such as food pantries, family counseling, youth tutoring, childcare, legal aid and transportation,
- Maintaining and creating affordable housing,
- Planning and implementing the revitalization of Medford Square with a significant goal in this process being the creation of a range of jobs across skill levels,
- Participating in the planning of the River’s Edge development at the intersection of Medford, Malden and Everett, which will include a significant workforce development component.

NON-HOMELESS SPECIAL NEEDS

Non-homeless Special Needs

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

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

Program Year 5 CAPER Non-homeless Special Needs response:

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

Specific HOPWA Objectives

Program Year 5 CAPER Specific HOPWA Objectives response:

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

OTHER NARRATIVE

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

Program Year 5 CAPER Other Narrative response:

Financial Summary Reports

City of Medford
CDBG Expenditures-Year 35

July 1, 2009 - June 30, 2010

<u>Activity#</u>	<u>Activity Name</u>	<u>Matrix Code</u>	<u>National Objective</u>	<u>Expenditures</u>
	Public Services	05-05U	LMC	\$ 254,706.60
2008-0020-639	Historic Pres - Shepherd Brooks Estate	16B	SBS	\$ 177,946.03
2008-0021-645	Streets - Hancock & Lyman	03K	LMA	\$ 710,515.02
2009-0026-666,682	Streets - Bow, Revere, Kilsyth	03K	LMA	\$ 755,118.68
2009-0027-672	Historic Pres - Salem St. Burying Ground	16B	SBS	\$ 17,590.00
2009-0035-686	Housing - 305 Riverside Ave. unit #2-1	14G	LMH	\$ 5,000.00
2009-0001-649	Planning & Administration	21A	N/A	\$ 315,756.76
Total:				\$2,236,633.09

City of MedfordPublic Services Expenditures-Year 35
July 1, 2009 - June 30, 2010

<u>IDIS Activity #</u>	<u>Agency</u>	<u>Expenditures</u>
2009-0002-650	Arc of Eastern Middlesex	\$ 6,000.00
2009-0003-651	Bread of Life	\$ 1,350.00
2009-0004-652	Community Family	\$ 2,250.00
2009-0005-653	Consumer Advisory Commission	\$ 9,000.00
2009-0006-654	Council on Aging	\$ 52,352.23
2009-0007-655	Immigrant Learning Center	\$ 5,000.00
2009-0008-656	Medford Family Life/Heading Home, Inc.	\$ 5,000.00
2009-0009-657	Medford Housing Authority-Security	\$ 16,380.00
2009-0010-658	Medford Public Schools (Early Childhood After School)	\$ 11,712.00
2009-0011-659	Mystic Valley Elder Services	\$ 10,800.00
2009-0012-660	Salvation Army	\$ 1,500.00
2009-0013-661	SCM Transportation	\$ 104,292.48
2009-0014-662	Triangle, Inc.	\$ 3,000.00
2009-0015-663	Tri-CAP	\$ 7,200.00
2009-0016-664	West Medford Community Center	\$ 18,869.89
	Total:	\$ 254,706.60

City of Medford

Program Income - Year 35
July 1, 2009 - June 30, 2010

Housing Rehabilitation Program Income (YR 5)

Housing rehabilitation monthly payments (7 loans)	\$ 6,650.12
Housing rehabilitation payoffs (2 loans)	<u>\$ 9,724.78</u>

Total: \$ 16,374.90

City of MedfordAmerican Recovery and Reinvestment Act of 2009
(ARRA) Expenditures-Year 35
July 1, 2009 - June 30, 2010

<u>IDIS Activity #</u>	<u>Agency</u>			<u>Expenditures</u>
<u>CDBG-R</u>				
2009-0025-665	Streets- Mayberry,Wheeler,Willard,Strathmore	03K	LMA	\$ 316,024.59
<u>HPRP</u>				
2009-0028-673,674	Tri-CAP			\$ 54,284.39
2009-0029-676,677	Heading Home, Inc.			\$ 44,814.61
2009-0030-678,679	Housing Families			\$ 32,368.00
2009-0031-681	Just-A-Start			\$ 5,210.88
2009-0032-682	Admin			\$ <u>17,099.88</u>
			HPRP Total:	\$ 153,777.76
			ARRA Total:	\$ 469,802.35