

C A P E R



JULY 1, 2009 –
JUNE 30, 2010



Somerville
Massachusetts

Consolidated Annual Performance and Evaluation Report

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EXECUTIVE SUMMARY

The City of Somerville receives federal grants from the Department of Housing and Urban Development (HUD) for three formula grant programs each year: the Community Development Block Grant (CDBG) program, the HOME Investment Partnership Act (HOME) program, and the Emergency Shelter Grant (ESG) program. For the program year 2009-2010 (April 1, 2009 – Extended to June 30, 2010), Somerville received \$2,884,053.00 in CDBG funds, \$967,305.00 in HOME funds, and \$126,615.00 in ESG funds. During that same time period the City of Somerville expended \$4,441,131.00 in CDBG funds, \$ 634,686.00 in HOME funds, and \$123,799.00 in ESG funds. It should be noted that the CDBG and HOME funds expended included prior years budgeted and unexpended CDBG and HOME funds, as well as some program income. Since 1989, the City has received over \$ 82 million of these funds in order to address vital infrastructure projects and programs within the City.

Each year, as part of the process of utilizing and administering HUD funds, the City of Somerville compiles a Consolidated Annual Performance Evaluation Report, or CAPER. This report describes how the City of Somerville used these resources over the previous fiscal year, what progress or accomplishments were achieved through these expenditures, and how these accomplishments fit within the larger context of the City's Five Year Consolidated Plan goals and objectives.

Below are a brief description of the different federal funds the City of Somerville receives, and the intended purpose(s) of those federal funds.

Community Development Block Grant Funds (CDBG):

The CDBG program is the federal government's primary program for promoting community revitalization throughout the country. The CDBG program has three general National Objectives:

- Benefit low-and-moderate income persons;
- Aid in the prevention or elimination of slums or blight; and,
- Meet other community development needs that present a serious and immediate threat to the health or welfare of the community.

CDBG funds are used for a wide range of community development activities directed toward neighborhood revitalization, economic development, and improved community facilities and services. Activities that can be funded with CDBG dollars include, but are not limited to; acquisition of real property, acquisition and construction of public works and facilities, code enforcement, reconstruction and rehabilitation of residential and nonresidential properties, homeownership assistance, micro-enterprise assistance, and the provision of public services such as employment, childcare, health, elderly services, education, and fair housing counseling.

HOME Investment Partnership Act (HOME):

HOME is the largest federal entitlement grant to state and local governments designed exclusively to create affordable housing for low-income households.

The City of Somerville can choose among a broad range of eligible activities consistent with its Consolidated Plan, and can use HOME funds to provide home purchase financing for new homebuyers or rehabilitation financing assistance to eligible homeowners; build or rehabilitate housing for rent or ownership; or for "other reasonable and necessary expenses related to the development of non-luxury housing," including site acquisition or improvement, demolition of dilapidated housing to make way for HOME-assisted development, and payment of relocation expenses. The City of Somerville may also use HOME funds to provide tenant-based rental assistance contracts of up to 2 years if such activity is consistent with the Consolidated Plan and justified under local market conditions.

Emergency Shelter Grant (ESG):

The Emergency Shelter Grant program provides homeless persons with basic shelter and essential supportive services. It can assist with the operational costs of the shelter facility, and for the administration of the grant. ESG also provides short-term homeless prevention assistance to persons at imminent risk of losing their own housing due to eviction, foreclosure, or utility shutoffs.

ESG funds are available for the rehabilitation or remodeling of a building used as a new shelter, operations and maintenance of the facility, essential supportive services (i.e., case management, physical and mental health treatment, substance abuse counseling, childcare, etc.), homeless prevention, and grant administration.

Community Development Block Grant Recovery Funds (CDBG-R):

The American Recovery and Reinvestment Act of 2009 (ARRA) is a effort to jumpstart the American economy, save and create millions of jobs, and address long-neglected challenges so our county can thrive in the 21st century.

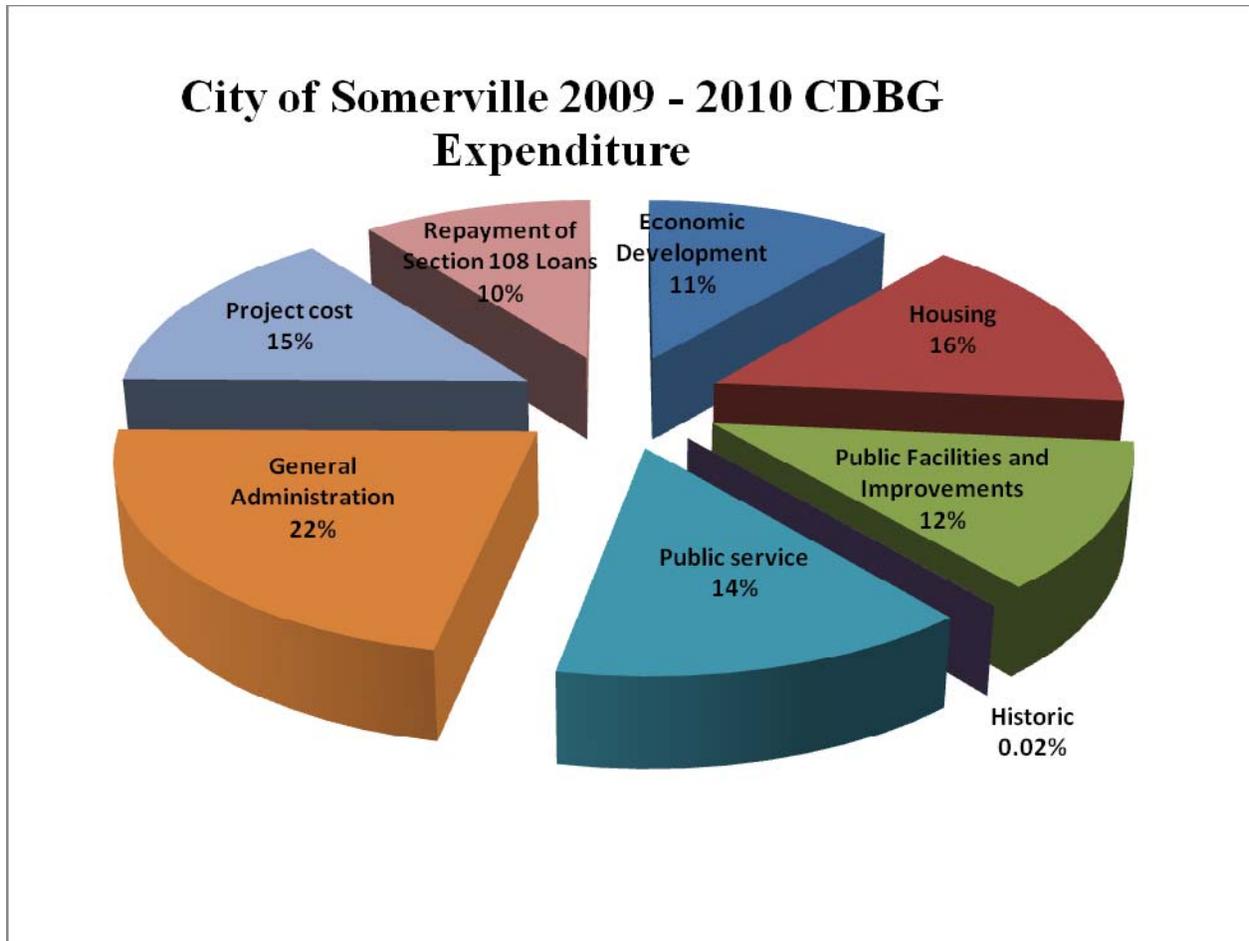
The CDBG-R program eligible activities are designed to stabilize neighborhoods and create jobs.

Homelessness Prevention and Rapid Re-Housing Program (HPRP):

HPRP was authorized under the Title XII of ARRA to provide financial assistance and services to prevent individuals and families from becoming homeless and help those who are experiencing homelessness to be quickly re-housed and stabilized.

Overview

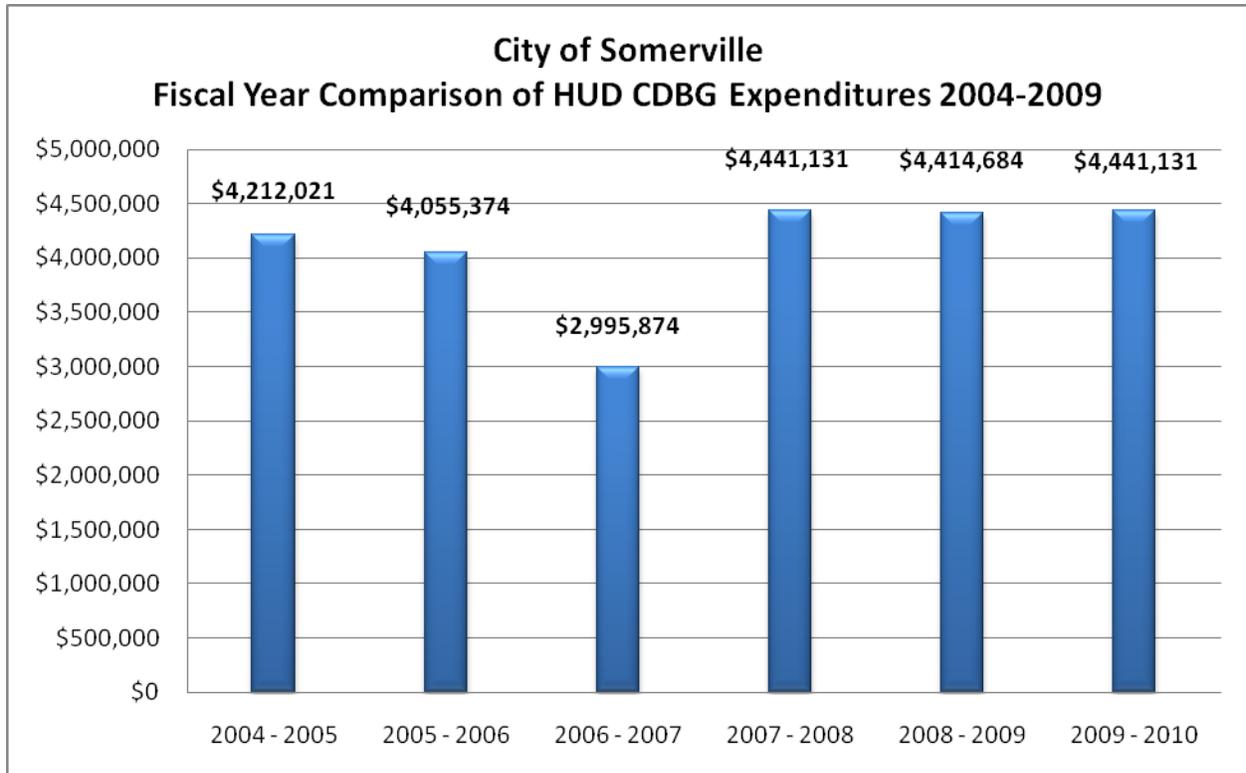
In Program Year 2009-2010 the City of Somerville expended \$5,199,616.00 in CDBG, HOME, and ESG funds primarily in support of low and moderate-income persons in the community. No spending occurred on the CDBG-R or HPRP programs due to timing of the grant award notices. Somerville expended these funds in support of different initiatives outlines in the City’s One Year Action Plan and its Five Year Consolidated Plan. Overall spending by category was as follows:



The City’s CDBG expenditure is broken down into the following nine categories:

- 1) Economic & Community Development;
- 2) Transportation & Infrastructure;
- 3) Parks & Open Space;
- 4) Historic Preservation;
- 5) Housing;
- 6) Public Services;
- 7) Section 108 Loan Repayment;
- 8) Project Cost
- 9) Planning & Administration.

The City's 2009-2010 CDBG entitlement funding from HUD was roughly level from the previous fiscal year at \$2,884,053. However, including the use of prior years' unexpended CDBG funds as well as program income, fiscal year 2009-2010 showed the City at a five year high in terms of CDBG spending towards One Year Action Plan projects and programs (see chart below). The City of Somerville's timing of construction for the larger projects contributed to an increased rate of expenditures between 2006-2007, 2007-2008, 2008-2009 and 2009 - 2010.



Organization of the Report

- Assessment of Goals & Objectives
- Supplemental Narratives
- Funds Leveraged
- Citizen Participation Plan

The appendices to this report include a listing of all projects with financial activity for this past year, a listing of all projects (with or without financial activity), and a map of the City of Somerville.

Contact Information

Inherent in the successful planning and execution of these programs and projects is the review and input of City residents and stakeholders. The Office of Strategic Planning and Community Development (OSPCD) and the City of Somerville overall is interested in and welcomes public input into these efforts. OSPCD also makes itself available to answer questions and discuss

various aspects of its programs. If you would like more information on any of the programs described in this report please contact the Office of Strategic Planning and Community Development at (617) 625-6600 ext. 2500.

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INTRODUCTION

The City of Somerville plans its annual housing, economic development, and other HUD funds projects with the guidance of the City's Five Year Consolidated Plan. This Five Year Consolidated Plan currently runs from 2008–2013, and contains assessments of various needs within the City, as well goals for addressing those needs over that five-year interval.

Annually, the City prepares a One Year Action Plan, which contains specific projects and programs to meet identified needs. These One Year Action Plans, while more detailed and tailored to the specific needs of the City for that particular year, are still guided by the broader needs assessments identified in the Five Year Consolidated Plan.

At the end of each One Year Action Plan, the City compiles a report, which explains, highlights and summarizes the goals and accomplishments for that year. This report is called the Consolidated Annual Performance Evaluation Report (CAPER).

Program Goals

The City of Somerville strives to provide a “thriving economy, a healthy community, a safe environment and quality lifestyle, and to promote maximum citizen participation in government.”

The City of Somerville seeks to support these goals for low-and-moderate income persons through grants of resources from the department of Housing and Urban Development (HUD) and from other State and Local sources. The federal HUD resources are granted to the City in the form of Community Development Block Grants (CDBG), HOME Investment Partnership (HOME) funds, and Emergency Shelter Grant (ESG) funds. These funds are administered by the City of Somerville through the Mayor's Office of Strategic Planning and Community Development (OSPCD).

CDBG Funds:

HUD describes the nature of these funds as providing “annual grants on a formula basis to entitled communities to carry out a wide range of community development activities directed toward neighborhood revitalization, economic development, and improved community facilities and services.”¹

HOME Funds:

HUD describes the nature of these funds as providing “funds allocated using a formula designed to reflect relative housing needs”² within the community. Eligible uses of funds include “homeownership down payment; tenant-based assistance, housing rehabilitation; assistance to homebuyers; and new construction of housing.”³

¹ 2005 Programs of HUD, published by the U.S. Department of Housing and Urban Development. Page 6

² 2005 Programs of HUD, published by the U.S. Department of Housing and Urban Development. Page 15

Emergency Shelter Grant Funds:

HUD describes the ESG program as “grants to states, metropolitan cities, urban counties, and territories based on the formula used for... CDBGs. Eligible activities include renovation, major rehabilitation, or conversion of buildings for use as emergency shelters for the homeless.”³

Working within the framework of the Five Year Consolidated Plan and the Annual One Year Action Plans, the City of Somerville utilizes these and other funds to meet critical community needs, enhance neighborhoods, improve facilities, and create economic opportunities for more of our residents. This CAPER and the information contained within, reflects the progress we have made over the last year.

ASSESSMENT OF GOALS AND OBJECTIVES

Economic Development

Arts Union:

Arts Union continues to cultivate and promote Union Square’s diverse artist and business community. In its fourth year, Arts Union presented a series of cultural events/performances; conducted weekend craft markets; continued with cultural tours; and commissioned local artisans to design streetscape furniture and lightscape projects. In addition, Arts Union successfully contributed to the Union Square zoning amendment which creates a new Arts Overlay District that facilitates the development of arts-related uses and live/work space by reducing parking standards and easing permitting requirements. CDBG funding for ArtsUnion is used to leverage a state grant from the Massachusetts Cultural Commission designed to promote the arts as an economic development opportunity

Union Square Main Streets:

Union Square Main Streets (USMS) worked with the City to develop new zoning to support Transit Oriented Development in anticipation of the new MBTA Green Line transit station due to open in 2014. USMS served as a vital liaison between the City and local residents, businesses and property owners.

Organization:

- With Somerville Arts Council and OSPCD created report on design industry in Somerville. Showed Somerville as ranking second in the state in design industry with 147 businesses.
- Built and launched Design Annex, a 1400 square foot co-working facility for designers.
- Secured funding from private donor of \$10,000.00 for capital costs along with significant pro bono assistance from Volunteer Lawyers for the Arts and Select Development to renovate space and develop legal structures for the initiative. Funding also secured through City of Somerville of \$26,000.00 in federal and state support.
- Facility was opened in September 2009, and 9 members have been recruited to date.
- Building partnerships with groups such as DIGMA, Boston Society of Architects, IDSA and AIGA. Launch event held April 2009 and Grand Opening in October 2009 attracted 100 guests each.

³ 2005 Programs of HUD, published by the U.S. Department of Housing and Urban Development. Page 18.

- Through establishment of Design Annex, a permanent and independent office space has been secured in the neighborhood for Union Square Main Streets. Moved offices in August 2009.
- Recruited new and oriented board members. Since summer of 2009 have 14 members.
- Conducted fundraising activities including earned income, direct donations and in-kind contributions that made up 27% of total budget in 2008. For 2009 grossed \$17,343.00 in private fundraising efforts plus \$23,865.00 in earned income.
- Recruited new members. Raised \$1,495.00 in member fees. Currently have 108 members.
- Continue to advice development of partner organization East Somerville Main Streets. Served as fiscal sponsor for ESMS.
- 2 representatives (Director Mimi Graney and Board Member Donald Warner) participating in 18 month Steering Committee for city-wide Comprehensive Planning.
- Hired and supervised in June 2009 through present Somerville Full Circle School student. Student worked 5 to 20 hours each week at the farmers market and in construction of Design Annex. Students are transitioning into program assistance.

Design & Transportation:

- Monitored progress in Green Line planning. Participated on Community Advisory Committee of Executive Office of Transportation. Participated in land-use planning discussions along the Green Line corridor with City of Somerville and Somerville groups.
- Actively participated in community outreach and education on Somerville Avenue reconstruction. Advocated for needs of local businesses.
- Sponsored Spring Clean-Up Day with approximately 60 volunteers participating.
- Recruited 24 volunteers to “Adopt a Planter” to maintain sidewalk greenery throughout summer 2009.
- Launched Project Beautification to plan for streetscape improvements for Spring 2010.
- Recruited 11 committee members who began work in October 2009.
- Recruited Focus Group for Union Square Streetscape and Roadway Planning and actively participated for multiple sessions to review initial plans. Promoted public meetings to review proposals which lead to standing room only crowds with hundreds of attendees.
- Responded to community concerns around sewer flooding and NStar power outages through summer of 2009 and communicated issues to City officials and utility providers.
- Reviewed proposals for ArtsUnion Beacon Project for 90 Union Square.

Promotion:

- Named Non-Profit of the Year for 2009 by Somerville Chamber of Commerce. Named Hot Neighborhood by Boston Phoenix and Weekly Dig. Executive Director Mimi Graney named one of nine Good Bostonians by Weekly Dig.
- Coordinated fifth year of the Union Square Farmers Market. Attendance continues to increase, with weekly average attendance now at 1,800. Recruited 2 new vendors to sell mozzarella and goat cheese as new product offerings. Continued to develop “Grown in Somerville Booth” at the market, hosting area businesses, community groups and city departments soliciting community input as guest vendors each week.
- Produced in fall of 2009 the fourth “What the Fluff?” festival that highlights history and arts community around invention of Marshmallow Fluff. Engaged team of 75 volunteers. Attracted 5,000 attendees and garnered national and regional publicity for the neighborhood. Article in Gastronomica Magazine about the event selected for “Best Food Writing”

Anthology. Presented on the festival at Gastronomica forum at Astor Center in NYC in spring '09.

- Received grant to produce the “What the Fluff?” festival for 2009 from the Somerville Arts Council/Mass Cultural Council. Increased and expanded business sponsorships including from Teddie Peanut Butter.
- Hosted fourth Winter Craft Market with vendors in area businesses. Coordinated the event with art studios at 285 Washington St, the Washington St Art Center, and Somerville Museum and increased attendance and overall sales for all.
- Coordinated monthly event series Second Wednesdays in Union Square. Monthly themes encourage visits to area businesses such as the pirate night that involved a treasure hunt and series of ribbon cuttings with the Mayor at new businesses. High point was Rock Paper Scissors Tournament with 100+ visitors in February 2009 and coverage by the Boston Globe. Series concluded in spring of 2009.
- Continued bi-monthly electronic newsletter. Increased subscribers by 20% to 3,200+.
- Maintained website detailing activities of USMS, providing technical assistance to area businesses and information on neighborhood issues to residents. High reached in 2009 of 23,000 visits in the month of September 2009. More typically receiving 7,500 visits per month. Begun redesign of the site.
- Maintained electronic community forum. Increased membership 24% to 91 members.
- Created Twitter and Facebook accounts to promote happenings in Union Square and USMS programs including @DesignAnnex, @FluffFestival and @AllAbout02143.
- Sent representative as part Somerville delegation to compete for All America City designation. Provided materials for the event including comic books, magnets and tattoos to promote the city.

Economic Restructuring:

- Actively participated in drafting of zoning changes for Union Square through participation in focus group and community meetings. Conducted community education and advocacy. Zoning passed Spring 2009.
- Secured pro-bono services through Community Design Resource Center of Perkins+Will. The visualizing resources and technical assistance to the Union Square zoning proposal was instrumental in revising of zoning and garnering community support.
- Provided technical assistance to new businesses including Boston Shaker, Gymnasium, Hope & Glory, Diggity Dog, SkyZone. In 2008 co-sponsored with East Somerville Main Streets and City of Somerville three threads of business and financial literacy workshops. Business workshops were held monthly.

Table 1: USMS Metrics:

Category	Details
Dues Paying Members:	In 2008 USMS had 108 resident and business donors. In 2009 we moved away from formal organization membership as a means of fundraising and are focusing on earned income and events to raise funds. In 2009 USMS had 28 cash donors (residents and businesses) and focused on soliciting in-kind (gift certificates primarily) from area businesses. These gift certificates and in-kind donations furthered our goal of developing a broader customer base.
Committee Membership:	USMS convenes committees for specific projects with the shorter time commitment allowing us to engage a larger number of community representatives. 75+ volunteers were active in our promotions activities; 16 people served on our board/organizing committee; 10+ on design; 8 on economic restructuring which includes the development of the Design Annex.
Board Membership	USMS has a board of directors of 15 members.
Annual Meeting	Union Square Main Streets' Annual Meeting was a less formal affair than in previous years and was held during the regularly scheduled May board meeting. USMS plans to make our Birthday Bash in February 2010 to be a Somerville Trivia Night fundraiser, to be held February 24, 2010 at the Somerville City Club.
501c3 Status	Union Square Main Streets was granted full status as a non-profit organization by the IRS on August 10, 2007. The organization serves as fiscal sponsor for partner organization East Somerville Main Streets for a Mass Cultural Council grant.
Fundraising	In 2009 USMS developed the Design Annex as a means of ongoing earned income for the organization within our mission of community economic development. With all six grant applications denied in 2010 the organization is focusing its efforts on earned income as a means of fundraising. This year the organization's total revenue was \$ 152,288.00. It earned \$ 17,343.00 from private donations (mostly in the form of \$10,000.00 from one donor for development of the Design Annex) and \$ 7,155.00 in sales of promotional items (mostly Fluff festival t-shirts) along with \$14,710.00 from fee for service programs (such as vendor fees for markets and Design Annex memberships). Fundraising makes up 27% of the USMS budget. For the first six months of 2010 USMS has raised \$11,336.00 through fee for service programs and private donations.

East Somerville Main Streets:

2010 marked East Somerville Main Streets' fourth year as an organization, and demonstrated its continued success. With the support of Community Development Block Grant funds, East Somerville Main Streets (ESMS) was able to continue to grow programs and initiatives offered. ESMS also came well along in their ability to leverage funds received, fundraising approximately 15,000.00 in additional grants and donations during calendar year 2010. They also nearly doubled their number of staff hours to support project through improved use of local internship programs, and added breadth to their work through donated professional services. ESMS showed increasing consistency and stability, entering into the second and third year of many of their most successful events. These events included the Under the Stars International Movie Nights, going into its third year. Lastly, ESMS showed their agility to develop new projects. In 2009, they took on the Savoring East Somerville Cookbook project, an initiative that attracted more than \$8,000 in funding, and the work of over one-hundred community members.

Organization: Organizationally, East Somerville Main Streets had a successful year, greatly fortifying its structure.

- National Main Streets Membership - Maintained their National Main Streets membership, continuing to be engaged in the National Main Streets movement and staying on the forefront of neighborhood business district revitalization.
- Organizational Planning - Kicked off 2009 with a board retreat to plan the year and set organizational goals.
- Promotional Materials - Successfully continued to make to make available the website and brochures in Spanish, English, and Portuguese.
- Press Coverage – Garnered feature articles in Spanish, English, and Portuguese, including in El Mundo, the Brazilian Times, and the Boston Globe.
- Website Growth - Maintained and expanded their website to include online sales of promotional items -further buttressing fundraising-, a calendar of events, newsletter and press archives, an online photo album, various brochures available for download, as well as other features.
- Membership –Met organizational goal of increasing business-membership by 75%. Met last year’s general-membership levels without having yet held an annual membership drive.

Promotions: In the realm of promotions, East Somerville Main Streets had a very successful year, hosting a large number of events and promotional activities, targeted to both build community and promote local businesses. These included:

Events:

- Interpreting East Somerville: A community photographic exhibition - Hosted an exhibition, in partnership with the City of Somerville, of over forty photographers’ work. The exhibit intended to engage and challenge the general public in their perceptions of East Somerville, and to drive new individuals to the business district.
- Go East: East Somerville Community Open Studios Site – Created the first exclusively East Somerville site for this city-wide arts event, drawing people from across the Boston area to the business district.
- 3rd Annual Under the Stars International Movie Nights – Hosted a three night movie festival, celebrating the neighborhood’s cultures through pre-movie music and entertainment and movie selection; gathered nearly two-hundred people at the events.
- First Tuesdays- Monthly Neighborhood After Hours – Planned and successfully implemented a monthly business promotion event-series (started in March 2009) driving, in total, more than 200 neighbors to local businesses.
- Participation in the Memorial Day Parade – Represented the organization and the neighborhood in a citywide parade seen by thousands, raising the profile of both.
- East Somerville Honks! – Worked with the Honk! Committee to bring a satellite version of the well-known Honk! Festival of Activist Street Bands to East Somerville, raising the neighborhood’s profile by bringing East Somerville into the network of citywide events where it has previously largely been absent.

Activities:

- Savoring East Somerville: A taste-based guide to the neighborhood – Developed a unique business district and cultural guide to promote local establishments, and build cultural

appreciation. Harnessed the collaboration of more than one-hundred volunteers in the completion of the project.

- Distributed the East Somerville Eats Brochure: Circulated more than 500 copies of the brochure and added it for download on the ESMS website. The brochure is designed to educate people on the cultural background of the neighborhood and to promote the business district.
- East Somerville Farmers Market Viability Evaluation: Partnered with the City’s grant writer in evaluating the feasibility/viability of an East Somerville Farmers Market.

Design: The East Somerville Main Streets Design Committee took on new life in 2009:

- East Somerville Clean Up – Tripled the number of volunteers involved in the annual neighborhood cleanup, expanded the cleanup area from one school yard to the entire neighborhood, and hosted a successful after party to build community.
- Storefront Improvement Program (SIP) – Partnered with the coordinator of the SIP to set up a weekly call in order to partner in promoting the program.
- Sullivan Square Clean Up – Created an outreach process for building partnership between potential community partners.

Economic Restructuring:

- Business/Commercial Property Inventory - Developed an extensive business and property inventory, including the square-footage of all commercial units in the corridor.
- Market Analysis - Partnered with economic development consultant Kathy McCabe in establishing current trends in the local market. Currently in the process of using that data for practical applications, including a most-wanted list for businesses.
- Continued Outreach to Local Businesses – Met with local business owners on a monthly basis, which was reflected in great increases in the financial support of local businesses in initiatives.
- Café Recruitment Committee – Researched the local market to establish the need for a café. Held informational interviews with the owners of 4 local cafés to find out their basic requirements for siting a café, as well as to vet their potential interest.

Table 2: ESMS Metrics:

Category	Details
Dues Paying Members (including businesses):	30 members have renewed their membership, – and the annual membership drive will happen in September 2010.
Committee Membership:	Committee Membership in 2010 met 2009 levels. We also have had more than 90 non-committee volunteers. .
Board Membership	ESMS added 2 new board members in 2010, raising its board membership from 14 to 16, including 4 members of the business community, shifting the resident focus on the board.
Annual Meeting	East Somerville Main Streets’ Annual Meeting was held on March 3, 2010 at Café Belo.
501c3 Status	East Somerville Main Streets was granted full status as a non-profit organization by the IRS on Sept. 28 th , 2009.
Fundraising	In 2009, East Somerville Main Streets reached its all time high of funds raised (beyond its CDBG funds), with \$2,200.00 in membership contributions, and \$15,000.00 raised through other fundraising. ESMS is currently in the process of launching its 2010 fundraising campaign and aim to exceed funds raised in 2009.

Union Square Farmers' Market:

In conjunction with Union Square Main Streets, the City of Somerville continued its support for the Union Square Farmers' Market in 2009-2010. Seasonal farmers' markets were held weekly in Union Square which has the benefit of supporting local farmers and increasing foot traffic and business activity in Union Square. Current estimates place the economic benefit to Union Square businesses at approximately \$650,000.00 annually.

Kiley Barrel Pre-Development:

The City continues to work with the Massachusetts Department of Environmental Protection (DEP), the federal Environmental Protection Agency (EPA) and the City's environmental consultant TRC, Inc. to gather additional data regarding the situation and to develop and implement an immediate strategy that minimizes the public's exposure to high levels of PCB's, arsenic and lead in area soils and a long-term strategy to fully address all environmental conditions. Some of the research involves reviewing historic records regarding the filling of the Millers River over a century ago. In addition, the DEP will be undertaking soil testing on properties on the east side of Allen Street so that the extent of the situation can be determined.

Small Business & Microenterprise Loan Program:

The City continued its partnership with Accion USA, a leader in the field of micro lending to small businesses and entrepreneurs who aren't being served by standard commercial lending institutions, to support a small business loan program un the City of Somerville. The project began with an initial market assessment, then marketing and outreach was implemented. The total amount of loans disbursed in the program's third year was six loans accounting for \$64,344.68, and the City of Somerville expended \$13,448.00 in support of this program during the FY 2008-09. Acción provided three financial and business training workshops.

Storefront Improvement Program:

The City has completed six new storefront improvements in 2009-2010 and will continue working on 15 projects in the next year ahead. To improve the process in future years the City has entered into contract with an architectural firm for on-call services.

Table 3: List of Store Front Improvements

Participant	Address	Status / Contract	Term	Funding
Bread & Co, Inc.	349 Broadway	10-052	08/01/2009-07/31/2010	\$30,891.00
Jumbos, LLC	688 Broadway	10-030	09/01/2009 – 08/31/2010	\$7,390.00
Louie's, LLC	193 Broadway	10-025	09/01/2009 – 08/31/2010	\$7,500.00
Cantina la Mexicana	257 Washington St.			\$7,480.00
Ball Sq. Fine Wines	716 Broadway	10-057	11/01/2009 – 10/31/2010	\$9,480.415.00
Ronnarong Thai Restaurant	255 Washington St.	10-142	03/01/2010 - 02/28/2011	\$33,259.00

TABLE 4: PY08 2009-2010 Economic Development Accomplishments

Program	CDBG Funds Spent	Year	Status
30 ALLEN STREET REMEDIATION	\$5,980.00	2004	COMPLETED
ADA STREETScape IMPROVEMENTS	\$28,742.00	2007	UNDERWAY
ARTS UNION	\$6,526.00	2007	UNDERWAY
ARTS UNION	\$19,605.00	2006	UNDERWAY
ARTS UNION	\$7,364.00	2005	UNDERWAY
EAST SOMERVILLE MAIN STREET	\$75,000.00	2009	UNDERWAY
EAST SOMERVILLE MAIN STREET	\$25,000.00	2008	UNDERWAY
FARMERS MARKET	\$12,000.00	2009	UNDERWAY
FARMERS MARKET	\$6,000.00	2008	UNDERWAY
KILEY BARREL PRE-DEVELOPMENT	\$5,980.00	2003	UNDERWAY
LOCAL HISTORIC DISTRICT EXPANSION	\$605.00	2004	COMPLETED
SMALL BUSINESS AND MICROENTERPRISE	\$16,086.17	2009	UNDERWAY
SMALL BUSINESS AND MICROENTERPRISE LOAN	\$13,448.00	2008	UNDERWAY
SMALL BUSINESS AND MICROENTERPRISE LOAN	\$3,873.31	2007	UNDERWAY
STOREFRONT IMPROVEMENT PROGRAM	\$20,055.00	2009	UNDERWAY
STOREFRONT IMPROVEMENT PROGRAM	\$64,459.00	2008	UNDERWAY
STOREFRONT IMPROVEMENT PROGRAM	\$19,041.00	2007	UNDERWAY
UNION SQUARE MAIN STREET	\$50,000.00	2009	UNDERWAY
UNION SQUARE MAIN STREET	\$25,960.00	2008	UNDERWAY
	\$405,724.48		

Evaluation of Goals

The City's Five Year Consolidated Plan lays out a number of objectives, which includes encouraging investment in underutilized areas, enhancing the vitality of existing commercial districts, increasing job opportunities, promoting job readiness, and building partnerships between the City and the business community. The City is focused on creating jobs and opportunities where there are needed, to develop mixed use communities where residents can live, work, shop and socialize

The City of Somerville continued to make progress towards its 5 Year Consolidated Plan Goals in 2009-2010 in the areas of Economic Development. In the first year of this five year plan, the City has made serious progress in achieving its goals. A comprehensive rezoning proposal for Union Square and Boynton Yards was ordained by the Board of Aldermen, plans for Assembly Square were approved, and a zoning study of Broadway was completed. The City established a new relationship with Somerville Local First, assisting them in printing a coupon and promotional book to increase foot traffic at locally owned establishments, while continuing its work with East Somerville, and Union Square Main Streets to promote business development in underserved commercial districts.

INSERT

Transportation & Infrastructure Improvements

East Broadway Streetscape:

The City hired a consultant, Design Consultants Inc. (DCI), to produce a dramatic redesign of the Broadway commercial district between the Boston city line and McGrath Highway. The design, since submitted at 75% by MassDOT - Highway, calls for the reduction of one travel lane in each direction, widened sidewalks with amenities, new bike lanes, and plaza areas at key nodes targeted for economic development. Community meetings were held during 2008 and 2009 to prepare and select a preferred alternative and determine the palette for the street furniture. Construction is anticipated to begin in the first half of 2011.

Green Line Planning:

Based on the City's recommendation and planning efforts, MassDOT changed the location of the future Green Line Maintenance Facility and submitted a Final Environmental Impact Report, which included the new alternative. This report was accepted and approved by EOEAA Secretary Bowles and the project will move into preliminary engineering in the fall of 2010. Also in the course of the environmental process, significant progress was made on the design of the extension including a commitment from the Commonwealth to design and engineer a shared-use path alongside the Green Line.

Union Square Transportation Plan:

The City is currently conducting a transportation and infrastructure study for the Union Square area funded by federal transportation funds and local capital funds that has resulted conceptual design of needed improvements. The plan will be moving to 25% design in the fall of 2010. A focus group of businesses, residents, and stakeholders has been guiding the planning process. Materials were presented to the public in spring 2010 to review alternatives and seek community consensus. The goals of the study are to improve public open space, balance modes between vehicle, pedestrian, and transit, and mitigate cut-through traffic.

ADA Streetscape Improvements:

The City is committed to improving pedestrian safety and providing increased accommodations for active transportation. Streetscape improvements, in the form of bump-outs, ramps, and high-visibility crosswalks were provided around schools, at parks, and in areas determined to be higher risk based on crash data.

TABLE 3: PY09 2009-2010 Transportation & Infrastructure Accomplishments	
GREEN LINE PLANNING	15,222.56
EAST BROADWAY STREETScape	123,003.29
ADA STREETScape IMPROVEMENTS	66,422.5
	204,648.35

Evaluation of Goals

Access to transportation is critical to the economic vitality of the City of Somerville both in terms of attracting new businesses that will bring jobs to the City and in facilitating Somerville residents' access to jobs throughout the region. The continued progress on the design of the

Green Line Extension and the new Orange Line Station in Assembly Square will result in having 85% of the residential population living within ½ mile of rapid transit whereas today, only 15% of the population has easy rapid transit access. Planning for Union Square, Brickbottom and Inner Belt are underway to ensure that City residents and businesses benefit from these new opportunities.

INSERT 2

Parks & Open Space

111 South Street:

This location remains under consideration as a site for an off-leash and passive recreational area.

Kemp Nut Park (Ed Leathers Park):

The City coordinated work on this park along with a state grant through the Executive Office of Energy and Environmental Affairs to construct a new park on what was formerly known as the Kemp Nuts property. Construction started June 2007 and was completed in the August of 2008. The new park includes a large grassy open space, over 80 new trees, hundreds of shrub and groundcover plantings, a garden walkway, a variety of play opportunities for children, and tree lined walking paths that both transition into the surrounding neighborhood and provide circulation within the park.

Additional work was completed to improve access to the park in 2010 and preparations are being made to expand the park by appraising and acquiring nearby properties.

Zero New Washington Street:

Design for a contemplative park geared toward low income seniors in the neighborhood coupled with an off leash recreational area has been completed and construction has begun with a target completion date of fall 2010.

Harris Park Design:

Preliminary work commenced on the design of Harris Park with an appraisal and other related advertising work for the property presently known as Harris Park. Because a potential land swap for more suitable property in East Somerville is being considered for this park, appraisal of the existing property is required. Negotiations are presently underway with a nearby property owner interested in swapping the City's land adjacent to the freeway with several parcels closer to Broadway. If agreement is reached, a new Harris Park could be designed that would provide a much better environment for local youth than the existing park does today.

Morse-Kelley

The City has completed designs Morse-Kelley Playground in order to transform a limited-use, limited-access ball court into a fully-accessible playground that draws residents of all ages from three nearby economic justice communities. The Morse-Kelley renovation is part of the City's effort to create a "recreation destination" in Central Somerville through complementary renovations to Morse-Kelley and nearby Dickerman Playgrounds.

- **For older children/teens:** Morse-Kelley will incorporate four new elements requested during public hearings. The Playground will become the pilot site for skateboarding in Somerville by incorporating six "skate-able" rails, benches and steps into the Playground's active areas. Skateboarding is extremely popular in Somerville but the closest skateboard park is in Arlington, almost four miles away. Specific stickball markings and two lateral climbing walls will be added. A mural, created by and for Somerville teens, will commemorate local youth who have died in the past decade. The

active area will retain a full basketball court, two paddleball courts, two 4-square courts and a tennis half court and backboard.

- **For Adults (and all ages):** In response to the public hearings, Somerville will add eighteen community garden plots, a water source, storage facility, composter and bulletin board. The plots will provide active recreation for all ages but especially adults; create diverse plantings that promote healthy eating; and encourage random adult presence that supports police efforts to protect the park.
- **For Tots:** The additional tot-lot requested during public hearings will be placed near the community gardens to serve young children whose parents are working in the gardens or enjoying the park.
- **Passive Areas:** These will include a refurbished pergola that can be used for parties and events, a game table with four seats, a drinking fountain and a community bulletin board. Greenery will be substantially enhanced throughout the Playground, with each section separated by plantings and benches.

Dickerman

The City has completed designs for Dickerman Playground in order to transform a narrowly-focused, semi-inaccessible, decaying play space into a fully-accessible all-ages park that draws residents from three nearby economic justice communities.

- **For younger children:** Somerville will refurbish the existing play structures and water play area. A new rubber surface will incorporate a teddy-bear motif. New benches and three table-chair combinations among the play structures will provide comfortable places for quiet play and supervising adults. When the adults are comfortable, young children will be able to spend more time in the playground.
- **For seniors, adults and older children/teens:** The court area of Dickerman playground will be turned into the flexible garden space requested during the public hearings. The new area will incorporate a picnic area, a tai chi/yoga area for all-ages exercise, seating areas and the bocce court that was also requested during the hearings. An existing mural will be retained. Lawns, winding paths and a ramp between the flexible garden and tot-lot areas will make the whole Playground fully accessible. Atelier Pilates, a nearby community-based business, has already expressed interest in holding exercise classes in the tai chi/yoga area. Dickerman Playground is next to the Dante Club, a large Italian-American social club whose members tend to be older adults. They still mourn the loss of the bocce court that operated in a Somerville restaurant approximately 1.5 miles away until the late 1990s. There has been no bocce court available to the public in Somerville since then. The Dickerman bocce court will be a pilot element for the City, and the City will monitor it to quantify usage, community benefit and upkeep costs.

Street Tree Planting Program:

The annual CDBG street tree-planting program is part of the City's plan increase the tree canopy in the city and to strengthen our street tree-planting program. As such, the plan included funds to plant 90-110 (based on size) new street trees in the low to moderate income sections of the city where the plantings are the most beneficial to the entire city. Funding also supports the maintenance and upkeep of previous tree plantings.

TABLE 6: PY09 2009-2010 Parks and Open Space Accomplishments

Parks & Open Space	CDBG Funds Spent	Year	Status
HARRIS PARK DESIGN	\$8,249.80	2009	COMPLETED
KEMP NUT PARK	\$6,173.82	2009	COMPLETED
111 SOUTH STREET	\$1,600.00	2009	COMPLETED
O WASHINGTON STREET	\$40,214.20	2009	COMPLETED
SOMERVILLE COMMUNITY PATH/JUNCTION	\$400.00	2009	COMPLETED
DICKERMAN PARK	\$22,000.00	2009	COMPLETED
MORSE KELLEY	\$22,000.00	2009	COMPLETED
STREET TYPE PLANTING PROGRAM	\$77,145.00	2009	COMPLETED
Total Parks & Open Space	\$100,237.82		

Evaluation of Goals

The City's Parks & Open Space program began to accelerate in PY08 and continues today despite the economic downturn. The City envisions completing 20 parks projects in the 2008-2013 Consolidated Plan. Over sixteen of those have received funding today, only 2 ½ years into the five year plan.

INSERT 3

Historic Preservation

Expansion of Local Historic Districts:

At the request of the Board of Aldermen, OSPCD staff has initiated additional outreach to the owners of properties proposed to be included in a major expansion of the Local Historic Districts. The process includes the development of new narratives, with the assistance of an outside contractor, for each of the significant time periods in our City's history and the resubmission of important documentation for property owners. The Historic Preservation Commission has nominated over 170 properties for designation. A total of 16 of these properties were reviewed in December 2009 and another 15 properties in June 2010 at joint public hearings between the Historic Preservation Commission and the Legislative Matters Committee of the Board of Aldermen. Of the properties submitted for consideration, 20 have been included in the Local Historic District list, while 9 are still being held for consideration at a later date. A third group of properties was submitted to the Board of Aldermen for consideration in April 2010. Additional properties will be considered throughout 2010.

Prospect Hill Park & Monument Technical Evaluation:

The City has hired a consultant to evaluate the current condition of the Monument and prepare a strategy for securing Massachusetts Historical Commission designation as a Historic District that includes extensive documentation of the site's history and development of a concept plan for park and interpretive exhibits. The Monument commemorates the raising of the first American Flag by General George Washington on January 1, 1776 during the siege of Boston. The consultant will develop a series of recommendations for repairing the monument and providing ADA accessibility. The report will also set the state for a historic interpretive exhibit and park improvements.

Historic Preservation Access Study:

The City has drafted a scope of work to develop a series of alternatives to provide ADA access to a historic library in west Somerville.

TABLE 7: PY09 2009-2010 Historic Preservation Accomplishments

Program	CDBG Funds Spent	Year	Status
EXPANSION OF LOCAL HISTORIC DISTRICTS	605.14	2009	UNDERWAY
	605.14		

Evaluation of Goals

The City continues to make strong progress toward achieving its Historic Preservation goals as outlined in the 2008-2013 Consolidated Plan. It has preserved and documented its cultural and natural heritage by preparing Historic Survey forms for the Massachusetts Historical Commission, and participating in plan review teams for new construction and rehabilitation projects. It continues to provide outreach and educational opportunities to low and moderate income residents and the general public by developing narratives for, and hosting, walking and biking tours of neighborhoods and commercial districts. Finally, it supports private preservation activities by sponsoring its annual Historic Preservation Awards program that honor Somerville residents who have made investments in their homes and businesses.

INSERT 4

Housing Programs

Housing is a major goal in the Five Year Consolidated Plan. In PY09, the City of Somerville made great strides in housing efforts, exceeding our goals in several categories and making significant progress in others. The City of Somerville expended almost \$1,030,875.00 of HOME and CDBG funds on housing programs and projects and has over \$1,960,345.00 invested in projects that are in progress. These activities are described in the tables below.

PY09 Housing Accomplishments

Program Name	Program Description	Funding
Housing Development	Provides funding for the development of affordable housing on a case-by-case basis.	o \$1,625,000 in HOME funds committed
<p>Housing Development money helps local developers acquire property, demolish buildings, rehabilitate existing properties and construct new properties for affordable housing throughout the City. Many projects also receive funding from the Somerville Affordable Housing Trust and other state and federal funding resources and private resources. All projects must build housing affordable to households making less then 80% of AMI.</p> <ul style="list-style-type: none"> o \$800,000 in HOME funds have been conditionally reserved to assist with construction and development of the St. Polycarp’s Village Phase II Rental project at the former site of the St. Polycarp Church property at 100 Temple Street. o \$80,000 in HOME funds to Walnut Street Center/Richdale Inc.’s Jackson Road Group Home, for rehabilitation and new construction of a facility for use as a group home for severely disabled adults with capacity for 5 individuals – Construction is underway. o \$245,000 in HOME funds to the Clarendon Hill Somerville Limited Partnership for rehabilitation of a 501-unit family rental building located at 1366-1374 Broadway. Construction is underway. o \$500,000 in HOME funds to the Somerville Housing Authority for the redevelopment of the Capen Court elderly housing project, a planned 95 unit development broke ground in early 2009. Capen Court is almost fully constructed and renting up is in progress. 		

Program Name	Program Description	Funding
Heating System Replacement Program	Provides homeowners a 0% interest deferred payment forgivable loan of up to \$4,500 to replace their inefficient heating system.	\$4,500.00 in CDBG expended
<p>Somerville’s aging housing stock means that demand for efficient heating systems is high as well. With increasing energy costs, inadequate heating systems can be a financial burden to a homeowner. The Heating System Replacement Program offers eligible homeowners the opportunity to reduce heating expenses and enjoy a warmer home.</p> <ul style="list-style-type: none"> o 1 homes received a new heating system 		

Program Name	Program Description	Funding
Housing Rehabilitation Program	Offers a 0% interest deferred payment loan providing up to \$25,000 to low to moderate-income homeowners to make necessary home improvements to their properties.	<ul style="list-style-type: none"> ○ \$269,633 in CDBG expended ○ \$0 in HOME expended ○ \$59,000 in CDBG in progress
<p>The majority of Somerville’s housing stock was built prior to 1920, which means that a large portion of our housing stock is in need of rehabilitation. This program provides incentives to property owners to improve their properties, while creating or maintaining affordable rental units. Loans can cover a wide range of improvements, interior and exterior, for both single and multi-family properties that may otherwise be prohibitively expensive.</p>		
<ul style="list-style-type: none"> ○ 10 rehab loans provided ○ 19 total units rehabilitated ○ 17 low or moderate-income families assisted ○ 4 elderly households assisted ○ 6 female-headed households assisted ○ 9 rehab loans in progress ○ 10 rental units rent-restricted ○ 12 units brought from substandard into compliance with HQS ○ 4 units brought into compliance with Lead Safety rules 		

Program Name	Program Description	Funding
Tenant Based Rental Assistance	Rental assistance provided to assist homeless and at-risk individuals and families	<ul style="list-style-type: none"> ○ \$70,439 in HOME expended
<p>Tenant Based Rental Assistance helps homeless and at-risk individual and families through two different programs. The Wayside Transitional Housing Program helps formerly homeless young adults in transitional housing to afford their rent, with the ultimate goal of moving into permanent housing. The Prevention and Stabilization Services Program (PASS) helps homeless and at-risk families to move into permanent housing or avoid eviction, by providing rental assistance or security deposits.</p>		
<ul style="list-style-type: none"> ○ 34 low-income young adults assisted ○ 11 low-income households were able to gain permanent housing ○ 8 individuals and 10 families currently receiving assistance ○ 22 female-headed households assisted 		

Program Name	Program Description	Funding
Homebuyer Assistance	Closing Cost and Down Payment assistance provided to low-income first-time homebuyers purchasing a home in Somerville	o \$30,000 in HOME expended
<p>Closing Cost Assistance in the amount of \$5,000 is provided to First-Time Homebuyers in the form of a 0% interest, 5-year forgivable loan. Down Payment Assistance of up to 15% of the purchase price of the property is provided to First-Time Homebuyers in the form of a 0% interest, deferred payment loan with equity sharing provisions. Any rental units in the properties purchased with Down Payment Assistance must be rented to a low-income family at HOME rents. Buyers can purchase any property in Somerville that meets 203(b) limits and Housing Quality Standards.</p>		
<ul style="list-style-type: none"> o 1 household received Closing Cost Assistance o 3 households received Down Payment Assistance o 1 unit was brought from substandard into compliance with HQS 		

Program Name	Program Description	Funding
Lead Hazard Abatement Program	Provides 0% interest forgivable loans for owner-occupied properties and 0% deferred payment loans for investor-owned properties to assist in the abatement of lead hazardous materials.	o \$1,237,332.37 in Lead Reduction Demonstration Grant expended o \$1,911,849.09 in Lead Hazard Control Grant expended
<p>Due to the age of Somerville's housing stock, many properties still contain lead paint. According to Massachusetts Law, any unit or single family home must be deleaded if the property has an occupant under the age of six. The Lead Hazard Abatement Program provides an incentive for property owners to comply with lead laws, create and maintain affordable rental housing, and establish a safe living environment for Somerville citizens.</p>		
<ul style="list-style-type: none"> o 129 loans provided o 49 units abated o 129 low or moderate-income households assisted o 11 loans in progress 		

Program Name	Program Description	Funding
Preservation of Expiring Use Properties	Provides funding for a consultant to work to preserve expiring-use rental properties throughout City	o \$0 in CDBG expended
<p>The City of Somerville works with consultant Emily Achtenberg and the Somerville Community Corporation to negotiate the preservation of expiring use properties throughout the City.</p>		
<ul style="list-style-type: none"> o Several existing subsidized properties will have their Sec. 8 contracts expiring in 2011 and the City along with the Somerville Community Corporation will be working together to negotiate with the owners towards efforts to sustain the terms of affordability of the housing units. 		

Other Housing Strategies

Affordable Housing Trust Fund:

The Somerville Affordable Housing Trust Fund (SAHTF), created in 1989, is dedicated to preserving and creating affordable rental and homeownership units in Somerville, in addition to carrying out programs to directly assist homeowners and renters. All of its activities must benefit low and moderate-income households (with incomes at or below 110% of area median income). In PY09, the Trust distributed \$89,000 in Housing Assistance Grants to six (6) non-profit organizations in Somerville. In addition, the Trust provided 0% interest, forgivable loans of \$5,000 each through the Closing Cost Program and assisted sixteen (16) low to moderate-income households in purchasing their first home through a forgivable loan for a total of \$80,000 expended in PY09 for Closing Cost loans through the Trust.

Inclusionary Housing:

Somerville's Inclusionary Housing Ordinance was established in 1990 to mitigate the impacts of market-rate housing on the supply and cost of low and moderate-income housing, to encourage housing opportunities for a mix of income groups while preventing their displacement and to ensure that housing remains affordable over the long term. Developments seeking special permits with site plan review for eight (8) or more housing units must offer 12.5% of the total units at a price affordable to low or moderate-income households. The City's Housing Division then markets these units to eligible buyers and monitors them to ensure affordability is maintained. In PY08, the Board of Aldermen had adopted a rezoning for the Union Square and Boynton Yards areas that include new zones with higher inclusionary requirements (eg. TOD-70 and TOD-100 require 15% inclusionary units and TOD-135 require 17.5% inclusionary). In PY09, the City's Inclusionary Housing Program sold a total of nine (9) condominiums to low and moderate-income households. The units are offered throughout the City of Somerville, located within the market-rate developments and constructed with similar quality, finishes and amenities as the market-rate units.

First-Time Homebuyer Training:

The City of Somerville recognizes the need for education around homeownership by supporting the efforts of the Somerville Housing Authority to offer a First-Time Homebuyer Training Course. The Somerville Housing Authority ("SHA"), in cooperation with the Massachusetts Homeownership Collaborative & MassHousing, conducts these classes, which include speakers from the Real Estate, Banking, and Legal Professions. Held several times a year for three nights, over 60 students attend each session. Graduates receive a Certificate, which allows them access to many housing benefits, such as the opportunity to purchase Inclusionary Housing Units, Down Payment Assistance, and special mortgage products. The City continues to market the classes through its website and coordinate with the SHA to connect new graduates with affordable homeownership opportunities.

Continuum of Care:

The Somerville Continuum of Care has been operating for many years. All local Homeless Providers collaborate through the Somerville Homeless Providers Group and eligible programs coordinate their application to the HUD McKinney Continuum of Care SuperNOFA. The City provides funding for a consultant to organize the application process.

In PY09, the City of Somerville Continuum of Care applied for funding for eighteen (18) programs. All eighteen programs were funded at the maximum level as shown below.

Table 9: Continuum of Care Programs

Organization	Program	Amount Funded
Heading Home	Better Homes 3	\$131,525.00
Somerville Homeless Coalition	Better Homes 2	\$417,423.00
Somerville Homeless Coalition	Better Homes	\$163,827.00
Wayside Youth and Family Support Network, Inc.	ShortStop THP	\$235,821.00
Catholic Charities	St. Catherine's Transitional Program	\$50,972.00
Somerville Homeless Coalition	Passages Case Management	\$194,608.00
CASPAR, Inc.	FirstStep Outreach	\$150,793.00
CASPAR, Inc.	Phoenix Center	\$81,498.00
CASPAR, Inc.	GEAR	\$114,450.00
Transition House	Family Development	\$14,073.00
Somerville Homeless Coalition	Passages Expansion	\$40,011.00
CASPAR, Inc.	Phoenix Expansion	\$39,138.00
Somerville Homeless Coalition	Shelter + Care	\$129,420.00
Somerville Homeless Coalition	Sobriety and Stability	\$131,450.00
Somerville Homeless Coalition	Sobriety and Stability II	\$234,726.00
Just a Start	Next Step	\$23,100.00
Heading Home	Somerville Stepping Stones	\$71,678.00
Somerville Homeless Coalition	Home for Good	\$9,275.00
TOTAL		\$2,233,788.00

In addition, the City and the Somerville Homeless Providers Group continue to implement the Somerville 10-Year Plan to End Homelessness.

Fair Housing Commission:

The Somerville Fair Housing Commission, created by City ordinance in 1985, is the local fair housing governing body and is comprised of five commissioners. Members must include a City or Housing Authority employee, a representative of a nonprofit community based organization, a local realtor or lender, a low or moderate-income tenant, and a person with substantial civil rights experience.

In PY09, the Fair Housing Commission continued aggressive outreach to Somerville tenants and also began efforts to inform landlords of their rights and responsibilities. The Commission has partnered with the Somerville Lead Hazard Abatement program and has focused efforts on conducting outreach and education around the topic of discrimination against families with children. The FHC is planning several Fair Housing Trainings for landlords as well as property managers, which will take place in PY09. The Commission is also planning a fair housing poster contest that two grade schools participate in during PY09.

The Housing Division has also worked to affirmatively further fair housing. An update of analysis of impediments to fair housing was completed in PY09 and we continue to address the issues identified in it. All information is available online and in multiple languages and we have also improved our list of resources for persons with disabilities with housing needs.

Tenant-Landlord Rights and Responsibilities:

In addition to staffing the Fair Housing Commission, the Housing Division provides information on basic tenant and landlord questions. The Housing Division website has been updated to include frequently asked questions, online resources and other information. “The Tenant’s Helper: A Handbook for Renters” was updated in PY07 and is available online as well. In addition, both tenants and landlords can call with questions and speak to someone in the Housing Division directly. Through the Somerville Homeless Providers Group and the Somerville Affordable Housing Trust Fund, the City has also developed relationships with local non-profits that provide tenant-landlord mediation. Just-A-Start Corporation and the Community Action Agency of Somerville provide eviction prevention and mediation and Cambridge and Somerville Legal Services provides legal aid to eligible callers.

Emphasis on Outreach/Communications:

The City of Somerville’s website and email system has become a large asset to the Housing Division and its ability to conduct business in the past year. The Housing Division’s website has been ranked #2 in the City of Somerville for user friendliness and usability. Residents can find applications for all housing programs, frequently asked questions for each program, outside resource links, agendas and minutes for Fair Housing Commission and Trust meetings, emergency shelter services, and Inclusionary Housing opportunities. Additional changes to the website include translation services, feedback opportunities, housing services for special needs groups and posted reports and studies relevant to housing in Somerville. All of these changes serve to increase the number of people who are able to access housing programs.

Evaluation of Goals

The City’s Five Year Consolidated Plan for 2008-2013, covering the period from April 1, 2008 through March 31, 2013, established a basic goal of creating, preserving or rehabilitating 406 units of housing for low and moderate-income households. This five-year goal includes the following objectives:

- Create new affordable housing
- Preserving existing affordable rental units
- Create housing for the chronically homeless
- Avoid poverty concentration through housing development
- Increase homeownership
- Prevent foreclosure and
- Rehabilitate housing stock

Other Notes from Housing:

2(e). The City of Somerville had no activities this year that caused displacement other than short-term rehab and lead projects.

NRSA Info

Units	Location	Amount
2	Union Square	\$ 17,594
3	East Somerville	\$51,305

Demographic Info Assistance by Race by all funds

Number	Race
0	Non-Hispanic Latino
54	White
20	Black/African-American
23	Hispanic Latino
2	Pacific Islander
2	Asian
4	Other
105	Total

INSERT 5

Public Service Grants

Arts Department Art without Walls:

Two summer arts programs were designed and implemented One for youth ages 5 through 12 exploring art, nature and imagination at the Community Growing Center. A summer job program was designed for youth ages 15-21 integrating environmental science and art through the creation of panels for a mural along Mystic Avenue took place

Better Homes Somerville Homeless Coalition:

Funding provided supported services to formerly homeless individuals and families to bring supported services and stability necessary for a successful housing experience.

Boxing for Life – Somerville Boxing Club:

Certified trainers provided at-risk youth with mental health conditioning using boxing as a tool to deliver intervention and strategies to motivate and support youth to build progressive success.

Boys and Girls Healey Technology Club:

In response to a school assessment technology gap, the Tech Club was formed and offered programs and tools so students could reach their full potential by promoting creativity through technology and increasing awareness of Internet safety skills.

Boys and Girls Healey Homework Club:

An enrichment after-school program was designed for youth ages 6 through 14 encouraging positive values and positive attitudes. Youth completed homework and then participated in recreational and/or enrichment activities.

Boys and Girls Safe Havens Program

A recreational, evening program was designed to engage at-risk youth ages 13 to 20. Youth participated in basketball programming supervised by recreational staff. Representatives from Community Policing stopped by to run workshops and build bonds with the youth participants.

CAAS Community Action Latino Youth Organize:

Low income Latino youth were trained and made presentations in the community of occupational safety and awareness.

Cambridge Public Health Teen Health Department:

High School teens were trained weekly under the guidance of a Health Educator and they organized various monthly, health related education activities and events for their fellow classmates. Additionally, they assisted with presentations in health classes.

CASPAR Outpatient Ambulatory Services:

Substance abusing clients were provided sobriety counseling by providing education, support services and tools to prevent relapse. Additionally, a substance abuse, prevention program was designed for school age youth.

Concilio Hispano Getting Ahead Adelante:

New immigrants were offered outreach, information and referral and community education workshops on immigrant rights, job placement, small business opportunities, housing and financial literacy.

Center for Teen Empowerment – Teen Organizing:

Youth ages 14 to 21 received leadership training which helped them become agents for change in the community. Youth identified initiatives and used an analytical process to determine priority issues facing the community and worked to improve their community, i.e. initiatives were designed to decrease negative behaviors, increase positive engagement in community and schools and motivate youth to excel in vocational and academic areas.

CIT-LIT Work Readiness Som YMCA:

Participants (ages 13- 15) completed a one month job readiness training that included team building and leadership development as well as hands on training and recreational activities.

Elizabeth Peabody House – Infant Toddler Program:

Affordable early care and education was provided to low income children ages one month through 3 years. Trained staff provided developmentally appropriate experiences to assist children achieve their goals in areas of social, emotional, cognitive and physical growth.

Employment Support Walnut St Center:

The agency provided access to community employment and re-invented the sheltered workshop to include silk screening.

Groundwork Somerville Youth Environmental Program:

A summer, job readiness program was designed for youth age 11 through 21 to learn urban agriculture and green job opportunities by maintaining and harvesting gardens, collecting compost and organizing workshops at schoolyard gardens.

Guidance Center Early Intervention:

Early intervention services were designed for linguistic minorities with children between 0-36 months. The agency stressed prevention and therapeutic intervention in home visits to maximize access and encourage independence.

Haitian Coalition ESL/Citizenship Classes:

Two levels of ESOL classes were taught at Clarendon Hill Public Development to enable participants to enhance communication skills, get better jobs, advocate for themselves and their families and become civically active residents.

Department of Health Somerville Cares about Prevention:

A coordinator was hired to lead and train teens in innovative strategies to prevent and reduce alcohol, tobacco and other drug use in Somerville and bring that message to their peers.

Just-a-Start Mentor/Aftercare Program:

Volunteer mentors were trained to support teen mothers ages 13 to 21 and equip the youth mothers with the knowledge and life skills necessary for independent living. They developed a relationship of trust and provided the youth mothers with positive role models to build a safe and nurturing living environment for themselves and their children.

MAPS MA Alliance of Portuguese Speakers:

A case manager provided culturally and linguistically competent assistance to Portuguese speakers in areas ranging from job and housing searches to help obtaining basic services and government benefits.

Mystic Learning Center Empowering Youth:

Young adults received job readiness training and obtained peer leadership training while providing younger children with enrichment and educational activities in an after-school program at the Mystic Public Development. Parents of younger children are involved in the delivery of programs and services, i.e. involvement in the Board, volunteer capacity, etc.

Respond 24 Hour Intake Referral Hotline:

Hot line advocates provided crisis intervention, information and counseling over the phone to individuals seeking domestic violence support services, referral and/or information and assistance with safety net planning.

SCM Transportation Elder/Disabled Clients:

This program promoted independence of seniors and disabled residents by providing community-based transportation to help residents maintain healthy mobile and connected lives. Transportation was offered to doctors' appointments, grocery stores and local Department on Aging events.

Somerville Community Corp School Mediation Program:

High School youth were trained in leadership and mediation skills and were called on to resolve conflicts. Youth lead workshops on conflict resolution skills, anti-bullying techniques and ways to resist peer pressure around gang recruitment. Youth were taught anger management and empathy and the ability to understand the other's point of view.

Somerville Cycle Kids Program

An in-school cycling program was designed to teach elementary school children how to ride a bicycle, bicycle safety tips and involve children in physical activity that addresses the health issues facing today's under-active, often overweight youth. The program was facilitated in cooperation with the Somerville Public Schools and the Somerville Police Department. The program served as a national model.

Somerville Department of Aging Health and Wellness:

Recreational, educational and health and wellness programming was designed for elderly residents at 3 Senior Centers. Direct social services were provided to at-risk elders. All services were developed to enable seniors to remain in their homes and maintain safe and healthy lives.

Somerville Disability Commission Access Report/Evaluation:

The Commission and First Responders developed a preparedness training for local Cable TV and for residents and agencies. Sample preparedness kits were prepared and distributed to enable residents to be self-sufficient for 72 hours in the event of an emergency or evacuation.

Somerville Homeless SOUP Pantry:

Three food pantries were operated and staffed to offer low income families and individuals 3 days worth of nutritious food each month. Additionally, the program offered a meal once a week and an opportunity for participants to socialize.

Somerville Homeless Volunteer and Resource Center:

This program provided a clearinghouse of current information linking residents to volunteer opportunities with groups and organizations in need. Through the Resource Center accurate information about homeless prevention services was provided 7 days a week, 24 hours a day.

Somerville Youth Program Drop In Center:

A supervised afterschool drop in program was designed and open 5 days a week to engage at-risk youth and offered them a safe place to meet. This program included tutoring, computers and games and positive role models for the youth to connect with staff.

Transition House Support Kent Street Residents:

Programs were designed to include case management, supported group services and workshops for residents living at Kent Street who were formerly homeless.

Walnut Health and Wellness Program:

Health and Wellness programming was designed for developmentally disabled adults, equipment was purchased and participants were trained in its use. Additionally, participants were partnered with buddies and attended gyms together.

Wayside Youth Junior Peer Leadership:

Junior Peer Leaders (ages 8-11) living in Clarendon Hill Development were recruited and trained in violence and gang prevention strategies, positive communication techniques and leadership skills.

Welcome Project ESOL Classes:

ESOL classes were offered to linguistic minorities at Mystic Housing Development to promote civic engagement in the community and to reduce the barriers to community participation.

YMCA Outreach Program:

The YMCA provided behavioral contracts and a systems approach to adolescent counseling to youth ages 10-17 years using high risk activities to reward youth for behavioral stability.

Youth Program Support Teen Empowerment:

A coordinator was hired and trained in the Teen Empowerment model and worked with youth on initiatives to bring about positive changes in the community.

TABLE 10: PY09 2009-2010 Public Services Accomplishments

Activity Name	Funded	Year	Status
BOY & GIRLS HEALEY TECHNOLOGY CLUB	\$2,787.20	2008	COMPLETED
RESPOND 24 HR INTAKE REFERRAL HOTLINE	\$20,232.00	2008	COMPLETED
SCM ELDERLY/DISABLED TRANSPORTATION	\$72,638.58	2008	COMPLETED
COUNCL ON AGING WELLNESS PROGRAM	\$32,043.00	2008	UNDERWAY
EMERGENCY FOOD PANTRY HOMELESS COALIT	\$65,198.95	2008	COMPLETED
COORD TEEN EMPOWERMT YOUTH PROGRAM	\$28,751.84	2008	COMPLETED
BOYS & GIRLS CLUB - HEALEY CLUB	\$10,236.00	2009	UNDERWAY
CTR TEEN EMPOWERMT TEEN ORGANIZING	\$85,000.12	2009	COMPLETED
CAMB HEALTH ALLIANCE TEEN HEALTH COUN	\$2,999.99	2009	COMPLETED
CASPAR SUB ABUSE SERVICES	\$5,000.00	2009	COMPLETED
CONCILIO SERVICES FOR LATINOS	\$3,800.00	2009	COMPLETED
ELIZ PEABODY HSE AFFORDABLE DAYCARE	\$10,000.00	2009	COMPLETED
GUIDANCE CTR EARLY INTERVENTION	\$4,500.00	2009	COMPLETED
HAITIAN COALITION ESOL CLASSES	\$11,080.00	2009	UNDERWAY
JUST-A-START MENTOR AFTERCARE	\$4,250.00	2009	COMPLETED

TABLE 10: PY09 2009-2010 Public Services Accomplishments Cont.

Activity Name	Funded	Year	Status
MAPS ADVOCACY FOR PORTUGUESE SPEAKERS	\$5,736.00	2009	COMPLETED
MYSTIC LEARNING CTR YOUTH LEADERSHIP	\$13,230.00	2009	UNDERWAY
RESPOND 24 HOUR CRISIS HOT LINE	\$20,551.00	2009	COMPLETED
SCM ELDERLY/DISABLED TRANSPORTATION	\$73,000.00	2009	COMPLETED
SOM COM CORP MEDIATION PROGRAM	\$12,370.00	2009	COMPLETED
SOM HOMELESS BETTER HOMES SUPPORT	\$7,808.00	2009	COMPLETED
SOM HOMELESS SOUP FOOD PANTRY	\$60,348.95	2009	UNDERWAY
SOM HOMELESS INFO/REFERRAL SERVICES	\$14,025.00	2009	COMPLETED
SOM YMCA YOUTH OUTREACH PROGRAM	\$7,230.00	2009	UNDERWAY
SOM YMCA COUNSELOR & LEADER TRAINING	\$25,000.00	2009	COMPLETED
TRANSITION HSE KENT ST SUPPORT	\$4,750.00	2009	COMPLETED
WAYSIDE YOUTH JR PEER LEADERSHIP	\$4,000.00	2009	COMPLETED
WELCOME PROJECT YOUTH INTERPRETERS	\$4,250.00	2009	COMPLETED
SOM ARTS COUNCIL ART W/OUT WALLS	\$9,800.00	2009	COMPLETED
SOM COUNCIL AGING WELLNESS PROGRAM	\$31,643.00	2009	UNDERWAY
SOM DISABILITY COM ACCESS SERVICES	\$2,000.00	2009	UNDERWAY
CYCLE KIDS	\$20,000.00	2009	UNDERWAY
	\$674,259.63		

Evaluation of Goals

The CDBG Public Service from April 2009 through June 2010 priority goals was to create opportunities for residents to improve their economic, social and political situation and to address homelessness through supported services. Somerville is fortunate to have a history of collaboration among social service agencies to grow and exchange information to best serve the City's residents and reduce duplication of services. Creative sharing of resources has enabled organizations to leverage funds to meet the needs and address the problems of the residents of Somerville.

HUD regulations allow commitment up to 15 percent of our CDBG allocation to public service activities. In FY09, 15 percent was committed and the funds were expended by several social service agencies for direct services to assist low income residents with educational opportunities and strategies to improve their living situation. Emergency Shelter funds were awarded primarily for shelter operation expenses and homeless prevention activities.

To comply with the intergenerational goal (goal 6 benchmark 2), the Council on Aging began working with 4 community after-school programs to bring about a Conversation/Reminiscence Group with elders and elementary school age youth to discuss and compare how free time was occupied, the groups share songs and dances and prepare a healthy snack together. While the awarded funds were reallocated, the strategy was reexamined while still meeting the goal. In FY09, the program was able to fund 30 public service programs to support job readiness programs to improve economic opportunities through education and affordable child care for

working families; mentoring and leadership training for youth; advocacy services for low income residents, linguistic minorities and substance abusers; transportation services for elders allowing them to remain independent.

Emergency Shelter Grants

The City funded five (5) agencies through Emergency Shelter funds that provided clients with supported services, case management and connected clients to outside resources to enable them to begin the transition from shelter to independent living and self-sufficiency. The Somerville Homeless Providers Group, five (5) of whom are ESG subgrantees, meet monthly to share resources and develop strategies to address the underlying causes leading to homelessness. They coordinated and participated in the homeless census count.

A Homeless Providers Collaborative was formed over six year ago to prevent Somerville residents from becoming homeless and to get them rapidly re-housed as quickly as possible. This Collaborative is comprised of 5 agencies in conjunction with the Somerville Homeless Providers Group. They began working together on a Boston Foundation homelessness prevention grant which has been funded, organizing annual fundraisers that assist at-risk residents with financial assistance and have secured additional homeless prevention funding from the Metro Boston Regional Network. This Collaborative responded to the RFP for Homeless Prevention Rapid Re-Housing (HPRP) funding. We are fortunate in Somerville to have such a strong group of providers united to advocate to the homeless.

ESG grants were awarded and expended using HUD’s eligible categories. Awarded agencies demonstrated matched funding as required by 42 USC 11375(a) (1) (see table below).

Table 11: ESG Grant Matching Funds

ESG Grant 2009	Awarded	Eligible Activity	Match
CASPAR Inc	\$23,955	Operation Costs	22K MIT in-kind, 3.2K agency overhead
Catholic Charities	\$13,225	Operation Costs	6K DTA, 7K Camb Com Foundation, 2.5K Ruth Farrisey Trust
Respond Inc	\$30,500	Operation Cost/Essential Service	38K Dept of Children & Families, 20.5K donations
Som Homeless Coaliton	\$53,725	Operation Cost	170K DTA, 11.6 College Ave Methodist Church, 12.7 FEMA, 3.7K donations
Transition House	\$2,394	Essential Service	17.4K Kent St Housing Project, 14K US Dept Housing
Administration	\$2,816	Administration	
	\$126,615		\$328,600

ESG Grant 2008	Awarded	Eligible Activity	Match
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CAAS Com Action Agency	\$9,500	Homeless Prevention	37.5K Com Service Blck Grant
CASPAR Inc	\$20,831	Operation Costs	78.8K Dept of Pub Health
Catholic Charities	\$11,500	Operation Costs	5.5K DTA, 3.5K Camb Found, 4.6K United Way
Respond Inc	\$30,500	Operation Costs	35K Dept of Soc Services
Som Homeless Coaliton	\$46,718	Operation Costs	80K Dept Trans Assist
Som Mental Health	\$3,000	Homeless Prevention	115K Boston Foundation
Transition House	\$2,394	Homeless Prevention	11.4K US Dept Housing
Administration	\$2,667		
	\$127,110		

Evaluation of Goals

Homeless Prevention goals were addressed in Goal 4 – Provide comprehensive programs for low income individuals and families who are having difficulty meeting their basic needs and Goal 5 – Prevent and address homelessness by providing interpersonal and systematic supports to undermine the causes of homelessness. As noted above, extensive work has been done to meet the goals in the second year of the plan. The FY09 data indicates that 29 percent of the clients served reported themselves as low income residents and 34 percent as very low income. Fifty-three percent of the clients served where from the minority community. Somerville is an ever changing city. While the City is working to meet the needs of the diverse community, these CDBG Public Service, Emergency Shelter and Recovery funds are an integral part of the fabric of the community. These funds enable social service organizations to leverage and garner other funds. 50 percent of the funds expended in FY09 were from funding year FY08. Per contract terms, vendors can submit invoices within 90 days of the end of the contract. However, the majority of the funds were expended for the current contract year.

INSERT 6

HOME Investment Partnerships Program

Expenditures

In 2009-10 the City of Somerville expended \$634,686 in HOME funds to further the City's goals of providing affordable housing. These expenditures included the following:

Housing Rehab	\$ 0.00
Down Payment & Closing Cost Assistance	\$ 14,600.00
Special Housing Projects	\$ 200,500.00
Tenant Based Rental Assistance	\$ 57,881.00
CHDO Projects	\$ 189,920.00
CHDO Operating Expenses	\$ 91,634.00
2007-2008 Admin Expenditures	\$ 80,151.00

The Administrative expenditures funded salaries, associated benefits, and other overhead costs to administer the HOME funded programs in 2009-2010. The Down Payment Assistance and Closing Cost Programs' HOME expenditures helped 6 households purchase their first home. The Tenant Based Rental Assistance (TBRA) expenditures assisted 13 families and 21 young adults between the ages of 18 and 22 with rental assistance which assisted their transition to permanent housing.

CHDO Project expenditures of \$189,920 represent the City's current year contribution to the housing development project at 460 Mystic Avenue, the St. Polycarp Village Apartments, a 24-unit rental project for low-income and formerly homeless persons. Special Projects HOME expenditures of \$200,500 represents the City's current contribution to housing renovation project at 1366-1374 Broadway, Clarendon Hill Towers a 501-unit rental project of the Clarendon Hill Somerville Limited Partnership, with 501 units for low-income households.

During 2009-10, the City expended \$111,027 of HOME Program Income (PI) to assist housing activities. (Please see Appendix G & H for more detail). These expenditures included the following:

Housing Rehab	\$ 0.00
Down Payment & Closing Cost Assistance	\$ 15,400.00
Special Housing Projects	\$ 19,500.00
Tenant Based Rental Assistance	\$ 35,127.00
CHDO Projects	\$ 41,000.00

Combined, this \$745,714 of HOME and HOME PI funds assisted 9 completed and 3 in-progress activities during the 2009-10 reporting period.

Households And Persons Benefitting:

A breakdown of these activities results in 6 homeowner or homebuyer households and 76 tenant households. Of the 6 homeowner or homebuyer households, 3 were white and 1 was Asian; 2 were categorized as other. One (1) homeowner or homebuyer households were at 50% of Area Median Income (AMI), 2 were at 60% AMI, and 3 were at 80% AMI. Of the 76 tenant households, 51 were white, 20 were black-Afro-American, 1 was Asian, 2 were native Hawaiian or Pacific Islanders; 2 were categorized as other, and 23 were Hispanic-Latino. Sixty-seven (67) tenant households were at 30% AMI, 5 were at 50% AMI, and 4 were at 60% AMI.

Overall in 2009-10, HOME assisted 82 households: 54 were white, 20 were black, 2 were Asian, 2 were native Hawaiian or Pacific Islanders; 4 were categorized as other, and out of these 82 households 23 were Hispanic-Latino. Of these 82 households, 59 were 1-person households, 8 were 2-person households, 8 were 3-person households, 4 were 4-person households, 2 were 5-person households and 1 was a 6-person household; 30 heads of household were single, non-elderly persons, 31 heads of household were elderly, 13 households were single parent households, 7 households were two parent households, and 1 household was characterized as other. Thirty-two (32) households were female-headed (see Appendix F for more detail).

Minority and Women Business Enterprises (M/WBE):

The City of Somerville makes every effort to be inclusive in procurement processes to both minority and women owned businesses, and partners with the State Office of Minority and Women Business Assistance (SOMWBA). It should be noted that the City's Housing Rehabilitation Projects assisted with HOME funds in 2009-10 were by agreements between the City and the homeowner/developer; the homeowner/developer in turn enters into agreements with vendors to perform the work. Thus, the City is not party to this aspect of the procurement.

The City of Somerville OSPCD's Housing Division does not contract directly with home improvement or other contractors. Individual property owners and developers, including the City's CHDO, solicit bids from vendors of their own choosing. Their selection is reviewed and must be approved by OSPCD. CHDO and other affordable housing developers commit to doing outreach to M/WBEs when seeking bids for construction and professional services. Of the two (2) housing development activities completed during the current CAPER period, \$413,704 in contracts and subcontract went to Women-owned businesses; \$836,795 went to Asian-owned businesses, \$36,000 went to Black-owned businesses, and \$788,608 went to Hispanic-owned businesses.

Minority Owners of Rental Property (Owned by individuals, not corporations or partnerships): There were no (0) HOME rental activities completed during the report period owned by minority individuals.

Affirmative Marketing:

The City's CHDO and other developers commit to doing affirmative outreach in marketing all HOME-Assisted units. Homeowners participating in the Housing Rehabilitation program with properties containing five or more Home-Assisted rental units are required to affirmatively market these vacant units. Of the two (2) housing development activities completed during the current CAPER period, St. Polycarp Village Apartments Phase I, a 24-unit rental project, filled vacancies through advertisement in area newspapers, local newspapers, minority newspapers,

flyers, banners, and contact with area community groups. The VNA Conwell Capen Senior Living Community, a 99-unit rental project, filled vacancies through direct mail to all households in Somerville, and multiple ads in local newspapers. There were no HOME-Assisted Housing Rehab activities of more than 4 units.

Housing Quality Standards Inspections:

As part of the process of administering the HOME programs and activities, the City carries out housing quality standards re-inspections of HOME assisted rental units to determine compliance with housing codes and other applicable regulations. The schedule for inspections is: every year for Tenant Based Rental assisted units and properties containing 25 or more HOME assisted units, every other year for properties containing from 5 to 24 HOME assisted units, and every third year for properties containing 4 or fewer HOME assisted units. 40 units were re-inspected during this time period and were all found to be in satisfactory condition.

Relocation and Real Property Acquisition:

Acquisition: There were six (6) HOME First-time Homebuyer Down Payment and/or Closing Cost Assistance activities and two (2) HOME rental activities during the report period that involved acquisition of real property: None involved relocation.

Table 12: HOME Program: Real Property Acquisition

Address	DPA	CCA	Development	Persons	Businesses
	Acquisition Cost	Acquisition Cost	Acquisition Cost	Displaced	Displaced
116 Sycamore St #30		127,500.00			
80 Webster Ave 4J		219,900.00			
80 Webster Ave 1L		183,000.00			
80 Webster Ave 2J		178,000.00			
80 Webster Ave 2K		222,000.00			
45 Endicott Ave #2		158,400.00			
460 Mystic Ave			922,562.00		
405 Alewife Brk Pky			2,500,000.00		
Total: 4,511,362.00		1,088,800.00	3,422,562.00	0	0

Timely Commitment and Expenditure Of Home Funds:

As of June 30, 2010, 100% of 2008 HOME funds were committed to eligible activities including required reservations for Community Housing Development Organizations (CHDO), and 100% of 2005 HOME funds were disbursed.

Table 13: HOME Fund Expenditure

HOME Grant	Required Commitments	Committed as of 6/30/2010	Required Expenditures	Expended as of 6/30/2010	Required Commitments to CHDO	Committed to CHDO as of 6/30/2010
2008	\$13598,970	\$13,756,279			\$2,039,846	\$5,232,974
2005			\$10,938,091	\$12,288,863		

Energy Star Units:

Of all newly constructed/gut rehab housing units completed and underway during the period 07/01/09 to 6/30/10

Total no. of units completed	123	Total no. of units underway	96
No. Energy Star qualified	24	No. to be Energy Star qualified	0
% Energy Star	19%	% Energy Star	0%

One (1) completed new construction activity which is being reported for this CAPER qualified for Energy Star rating, the 24 units at 460 Mystic Avenue, St. Polycarps Village Apartments Phase I. This activity also received a Silver LEED (Leadership in Energy and Environmental Design) Rating. The ninety-nine (99) units at the VNA’s Conwell Capen Senior Living Community though highly energy efficient is ineligible for Energy Star certification because the tenants will not have individual electric meters.

Still underway are 95 modular units at the SHA’s Capen Court Senior Housing, and 1 gut rehab unit at Walnut Street Center’s Group Home at 25-27 Jackson Road. Though highly energy efficient the SHA’s Capen Court Senior Housing is anticipated to be ineligible for Energy Star certification because the tenants will not have individual electric meters and 25-27 Jackson Road does not anticipate any energy conservation measures in excess of building code.

Planning & Administration

The City remained within its cap of 20% of CDBG funds for various planning, administration, and capacity-building activities for 2009-2010. Planning & Administration expenses totaling \$690,017.91 represents 12.1% of the City’s 2009-2010 entitlement grant of \$2,884,053.00 and program income of \$655,283.00 In addition the aforementioned spending, the City progressed on the Activities promoting long-range planning highlighted in the table below:

Community Development Project Costs

In direct support, management and supervision of the various funded projects and activities, the City expended a total of \$453,372.00 in CDBG funds. This includes direct wages and associated fringe benefits for this work.

Section 108 Loans

The City expended \$323,580.00 in CDBG funds for the ongoing principal and interest payments on its Section 108 Loan. These payments represent the debt service for the purchase of Boynton Yards properties, and these payments are scheduled to continue through 2011.

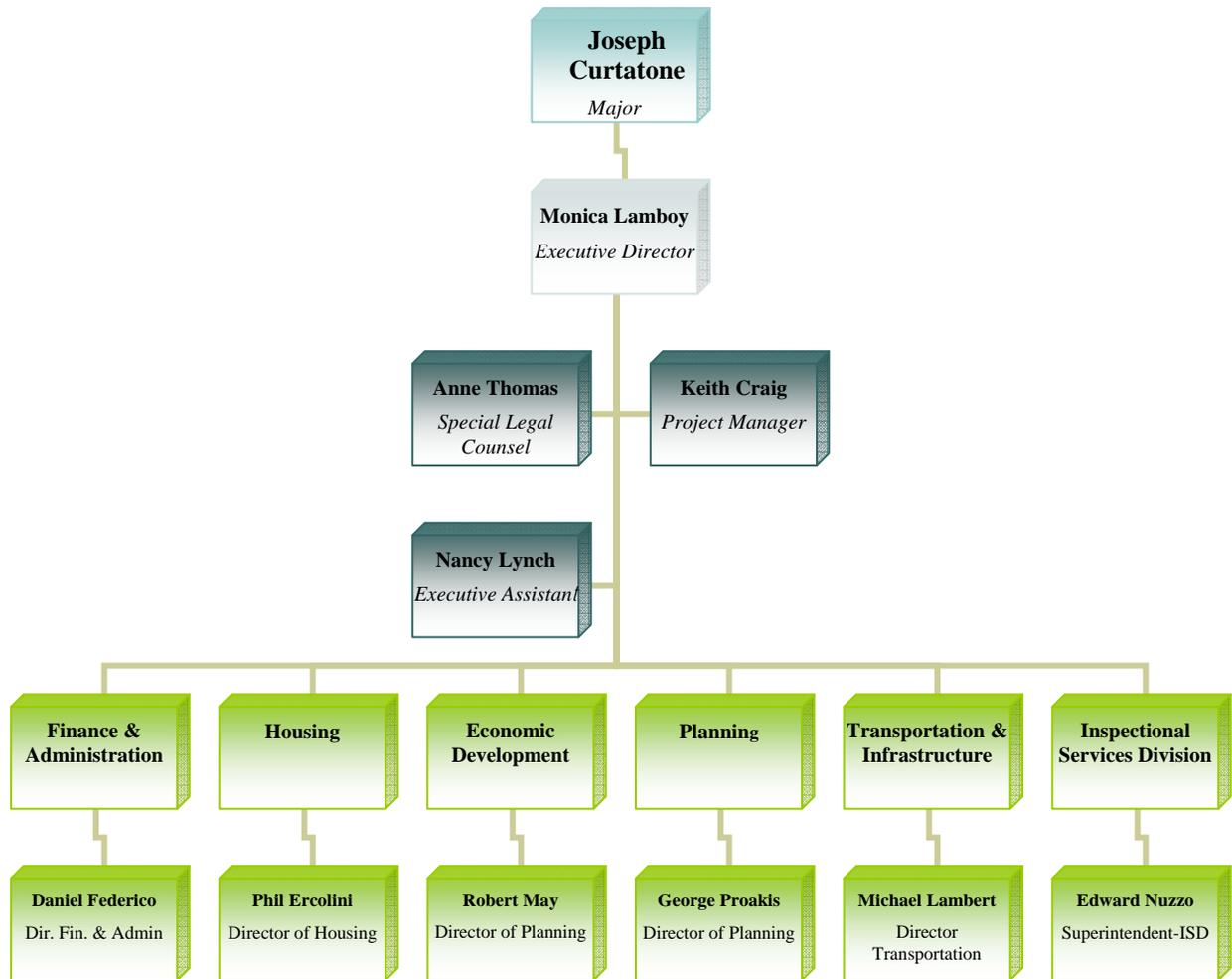
TABLE 14: PY09 2009-2010 Other Accomplishments

Program	CDBG Funds Spent	Year	Status
PLANNING & ADMINISTRATION	\$ 690,017.91	2009	Complete
COMMUNITY DEVELOPMENT PROJECT COSTS	\$ 453,372.00	2009	Complete
COMMUNITY & ECONOMIC DEVELOPMENT PROJECT	\$ 344,926.36	2009	Complete
SECTION 108 LOAN REPAYMENTS	\$ 323,580.00	2009	Complete
	\$ 1,811,896.29		

OTHER ACTIONS

Managing the Process and Institutional Structure:

The City of Somerville administers all its HUD funded activities through the Office of Strategic Planning and Community Development (OSPCD). Under the direction of the Executive Director of OSPCD, and the Director of Finance and Administration, the City of Somerville assesses, plans, and carries out the various projects and activities to further the goals and objectives outlined in the One Year Action Plan and the Five Year Consolidated Plan.



As is illustrated in the above organizational chart, the City's OSPCD is organized into six separate divisions: Finance & Administration, Housing, Economic Development, Planning, Transportation & Infrastructure, and Inspectional Services. This organizational structure allows optimum cross-coordination among various divisions involved in the community development process.

Coordination with Other Organizations

The City, both in its planning and its execution of community development programs and activities, is continually working with other City departments, organizations, outside agencies and institutions in order to effectively carry out its mission.

Over 32 different public service organizations received funding for this year, 6 different outside agencies received Emergency Shelter Grant funding, and the City worked with its CHDO (Somerville Community Corporation) on affordable housing production and other issues.

The City coordinated planning activities for transportation and infrastructure projects with many different local, regional, state and federal agencies, including: Somerville DPW, MassHighway Department, the State MPO, MAPC, State Executive Office of Transportation, the Massachusetts Bay Transportation Authority, the Federal Transit Administration, and the Department of Conservation and Recreation.

The City's Housing activities were coordinated with the Somerville Housing Authority, the Affordable Housing Trust Fund, the Somerville Homeless Coalition, and various State and federal offices.

Throughout the fall and winter of 2008-2009 the City of Somerville reached out to over 25 state, regional, and local organizations as part of the 5 Year Consolidated Plan development. Six public hearings were held at various locations through out the City where residents and representatives of local organizations were present.

Monitoring

The City of Somerville works closely with all its sub-recipients in order to ensure the goals and objectives of the HUD programs are adhered to and National Objectives are being met.

Sub-recipients enter into detailed agreements with the City to ensure all federal, state, and local regulations and criteria are being adhered to and met. Monthly and/or quarterly reporting from sub-recipients allowed the City to monitor progress each was making toward its year-end goal(s). On-site monitoring was also conducted by OSPCD to further ensure that overall funding goals and objectives were being met.

The City also conducted on-site monitoring of federally funded construction projects to ensure compliance with Davis-Bacon wage laws.

Housing activities were monitored with the assistance of Housing Inspectors and staff, and where appropriate, the City's Building Inspectors. This allows for multiple levels of oversight of various federally funded activities to ensure compliance with all local, state, and federal requirements.

SUMMARY/PROGRAM EVALUATION/CONCLUSIONS

In 2009-2010, the City of Somerville made final progress towards the implementation of the broader vision laid out in the City's 2008-2013 Five Year Consolidated Plan. Under Economic Development, the Union Square Main Streets and Union Square Farmers' Market Activities continued their successes and progress continued on Assembly Square and Union Square redevelopment planning. In the areas of Historic Preservation, and Housing, the City continues to make progress towards its 5 Year Goals. Reflecting the need for public services in the City of Somerville, as well as aggressive management of limited resources, the City of Somerville has achieved or surpassed most of its 5 Year Consolidated Plan Goals in the Public Services Grants and Emergency Shelter Grants programs. Overall, year one of the City's 5 Year Consolidated Plan showed marked progress in many areas, and with additional planning and other work being performed on Assembly Square and Union Square areas, the foundation was being laid for even further progress under a new Consolidated Plan in the years to come.

SUPPLEMENTARY NARRATIVES

Use of CDBG Funds

In program year 2009-2010, the City of Somerville's CDBG expenditures complied with the objectives and priorities outlined in the 2008-2013 Consolidated Plan. More information on these expenditures can be found in the Assessment of Goals and Objectives section above.

Changes to Program Objectives

During the 2009-2010 program year no substantive changes were made to the program objectives laid out in the 2009-2010 Action Plan.

Compliance with Planned Actions

All CDBG resources were utilized in the furtherance of the goals and objectives of the 2008-2013 Consolidated Plan.

Compliance with National Objectives

In program year 2009-2010, the City of Somerville expended funds in the furtherance of the three National Objectives of the CDBG program. The City has focused to a large degree on CDBG expenditures for low/moderate area benefit. The City has also complied with the overall benefit certification (see Table 15):

TABLE 15: PY09 Expenditures Meeting National Objective

Total 2009-2010 CDBG Expenditures	\$4,441,130.72
Total Program Administration	\$690,017.91
Total Subject to Low/Mod Benefit Calculation	\$3,751,112.81
Total Non-National Objective Expenditures (Sec108 Loan Payments)	\$323,580.00
% PY08 Expenditures Meeting National Objective	84.5%

Relocation

In program year 2009-2010, no CDBG funds were expended on projects that required the permanent displacement or relocation of people, businesses, or organizations from occupied property. The City of Somerville did provide some temporary to families for relocation assistance through the Housing Rehabilitation program where units of housing were being rehabilitated.

Economic Development Activities

Please see the discussion of Economic Development activities in the Assessment of Five Year Goals and Objectives section of this report.

Limited Clientele Activities

In addition to the City's Public Services activities (which benefit low and moderate income clientele), the City funded and expended CDBG resources that served limited clienteles. These activities included:

- Groundwork Somerville Activities (Public Facility Improvements)
- Trum Field House ADA (Americans with Disabilities Act) Design & Construction of accessibility features.

Program Income

For the program year 2009-2010, Program Income was generated in the following categories:

TABLE 16: PY09 Program Income

Program	Funding Source	Amount
Housing Rehab Loans	CDBG	\$64,264
Housing Rehab Loans	HOME	\$111,164
Housing Development Loans	HOME	\$19,138
Land Sales	CDBG	\$650,000
Misc. Admin. (copies, etc...)	CDBG	\$950
Total		\$845,516

Of the CDBG Program Income that was generated in 2009-2010 under the Land Sales category, \$ 650,000.00 was derived from the sale of Yard 21. The \$ 950.00 of CDBG Miscellaneous Administration program income is comprised of smaller items such as fees for photocopies, etc... The Housing Rehab Loan program income represents repayments of various loans outstanding for both the CDBG and HOME programs (see below).

The Public Service Grant program did not generate program income. However, a few organizations received voluntary donations and those donations were used for program operation expenses. For example, donations received by the Department on Aging for Chi Gong health and wellness exercise classes (approx. \$ 120.00 per quarter) were used for nutritious refreshments for the group; donations received by SCM Community Transportation for elderly and disabled transportation (approx. \$ 1,900.00 per quarter) were used to defray transportation operation costs.

Loans & Other Receivables

The City has outstanding loans receivable from homeowners who participate in the City's Housing Rehabilitation program. The tables below provide summary information regarding these loans.

TABLE 17: PY09 Housing Loans **FORGIVEN 7/1/09 – 6/30/10**

Program	# of Loans	Principal Balance
CDBG Loans	5	\$49,875
HOME Loans	2	\$8,894
LEAD Loans	9	\$143,645
LHRD Loans	0	\$0
SAHTF Loans	3	\$4,500

TABLE 18: PY09 Housing Loans **OUTSTANDING 7/1/09 – 6/30/10**

Program	# of Loans	Principal Balance
CDBG Loans	150	\$3,072,056
HOME Loans	113	\$6,656,650
LEAD Loans	68	\$1,300,494
LHRD Loans	39	\$788,049
SAHTF Loans	94	\$1206,594

TABLE 19: PY09 Housing Loans **NEW 7/1/09 – 6/30/10**

Program	# of Loans	Principal Balance
CDBG Loans	17	\$405,980
HOME Loans	10	\$529,750
LEAD Loans	4	\$147,160
LHRD Loans	18	\$394,905
SAHTF Loans	16	\$80,000

TABLE 20: PY09 Housing Loans PAID 7/1/09 – 6/30/10

Program	# of Loans	Principal Balance
CDBG Loans	5	\$82,420
HOME Loans	4	\$71,264
LEAD Loans	1	\$100
LHRD Loans	0	\$0
SAHTF Loans	3	\$43,338

HUD Neighborhood Revitalization Strategies

The City of Somerville continues to accelerate efforts to revitalize two important Neighborhood Revitalization Strategy Areas (NRSA’s): 1) Union Square, and 2) East Somerville.

Union Square:

Work in the Union Square NRSA continued with the growth of the Union Square Main Streets program, as well as the Union Square Farmers’ Market. Arts Union, Union Square Way finding, and Milk Row Cemetery Restoration Projects have also seen progress and are supporting the City’s larger goals in this area.

The City of Somerville continues to move forward with planning efforts for the revitalization of Union Square. In support of this goal, in 2009-2010 the City:

- 1) Advanced the Union Square Transportation and Infrastructure study by selecting a locally preferred alternative for a new roadway network that balances the needs of all modes and increase the usable open space in the square to 40,000 sqft.,
- 2) Secured development agreements with two property owners in Boynton Yards for future Transit Oriented Development projects,
- 3) Completed a Supplemental MCP Phase II and Phase III report for remediation of the Kiley Barrel brownfield site,
- 4) Substantially completed an application for a District Improvement Financing plan which includes large portions of the Union Square and East Somerville NRSA Districts,
- 5) Initiated a Municipal Space Needs Analysis and Master Facilities Plan which identifies surplus land for redevelopment,
- 6) Continued to promote and plan for the introduction of MBTA Green Line service to Union Square, and,
- 7) Continued construction of roadway improvements leading into Union Square on Somerville Avenue.

These specific efforts are in addition to other efforts funded through the CDBG program for programs such as the Housing Rehabilitation program, and the Street Tree Planting program. Please see the Union Square Performance Matrix in the Appendix to this document for further information.

East Somerville NRSA:

Work on the East Somerville NRSA continued in 2009-2010 with CDBG funded projects including design of the East Broadway Streetscape Project, the Storefront Improvements

Program, and the fifth year of the East Somerville Main Streets organization. The micro-enterprise loan assistance program through the City's partner Accion, USA saw targeted outreach efforts in both the East Somerville and Union Square NRSA's. Tree plantings through the CDBG funded Street Tree Planting Program also focuses on East Somerville. These specific efforts are in addition to other efforts funded through the CDBG program for programs such as the Housing Rehabilitation program which can benefit the East Somerville NRSA in individual cases. Please see the East Somerville Performance Matrix in the Appendix to this document for further information.

Performance Measurement

The City of Somerville is placing increased emphasis on measuring performance, not just for HUD funded programs but city-wide. The City continues to refine its system of program-based budgeting with the assistance of the Somerstat Department and the City Auditor's Department.

OSPCD continues to place great emphasis on the importance of measuring performance in HUD funded programs and activities. The City is continually refining its procurement and contracting processes in order to identify new and stronger ways to quantify the results of the CDBG, HOME and ESG expenditures – particularly in the scope of services.

Public Services: Sub-recipients of CDBG funds report back on a variety of performance indicators – including information on the types and number of persons served, the nature and quantity of those services, the cost of those services, and other sources of funding to provide these services. More information on this can be found in the Public Services discussion earlier in this report.

Housing: The Housing Division keeps a variety of records on the different housing programs and projects, including: eligibility information of qualified Housing Rehabilitation projects,

Economic Development: Because of the unique nature of economic development projects, performance measures for each are assessed on an individual basis based upon the CDBG National Objective associated with each project. This information frequently includes census tract data and is kept in centralized files.

Public Infrastructure: These projects also tend to be unique in nature, and these performance measures are also assessed on an individual basis based upon the CDBG National Objective associated with the project. Many of these are park reconstruction projects, and this information frequently includes census tract data and is kept in centralized files.

Historic Preservation: The City tracks performance on its Historic Preservation projects in a number of different ways, depending on the project. These performance measures include: detailed census tracts, and records of each property that is assessed, surveyed, or rehabilitated.

Emergency Shelter Grants: Sub-recipients of ESG funds also report to the City on a variety of performance indicators – including information on the types and number of persons served, the nature and quantity of those services, the cost of those services, and other sources of funding to provide these services. More information on this can be found in the Emergency Shelter Grants discussion earlier in this report.

Funds Leveraged

Table 21: 2009-2010 Funds Leveraged

Program	CDBG Expenditures	HOME Expenditures	ESG Expenditures	Funds from Other Sources
Housing	\$483,045.36	\$634,686		36,389,315
Homelessness		\$93,008.00		\$1,075,628
Public Services	\$442,716.96		120,830.78	\$328,600
Historic Preservation	\$605.14			
Transportation & Infrastructure	\$ 281,793.35			45,812,000
Parks & Open Space	\$ 100,637.82			2,150,000
Economic Development	\$ 350,906.38			\$84,344.68
Total PY09	\$ 1,659,705.01	\$727,694.00	\$ 120,830.73	85,839,888
Total Funds Leveraged Per HUD Dollar in PY10:		\$34.22		

Public Service Agency Match Contributions:

Table 22: 2009 – 2010 Public Service Match Contributions

Agency	Awarded 09-10	Match Amount	Match Source
Boys & Girls Clubs			United Way
Boys & Girls Clubs	\$10,236	\$ 23,000	Boys & Girls Clubs of America
Cambridge Pub Health	\$3,000	\$35,000	Dept of Public Health
CASPAR Inc	\$5,000	\$9,000	Third Party Billing
Concilio Hispano	\$3,800	\$13,000	MA Dept of Public Health & Dept of Education
Ctr Teen Empowerment	\$85,000	\$125,000	MA budget
Eliz Peabody House	\$10,000	\$17,391	United Way
Guidance Center	\$4,500	\$4,700	Annual Mail Appeal
Haitian Coalition	\$11,080	\$46,000	Tufts University, Boston Adult Literacy
Just-a-Start Corp	\$4,250	\$18,470	Foundations and Private Sources
MAPS Port. Speakers	\$5,736	\$29,000	Camb, CDBG and Affordable Housing Trust
Mystic Learning Center	\$13,230	\$37,500	Clipper Ship, Drueding and Hunt Alternative Foundations
Respond Inc	\$20,551	\$39,387	Dept. of Children and Families
SCM Com. Transport.	\$73,000	\$80,000	Medford and Cambridge CDBG
Somerville Comm. Corp	\$12,370	\$245,000	Attorney General & Somerville School Department
Somerville Homeless BetHom	\$7,808	\$175,000	HUD
Somerville Homeless SOUP	\$60,348.95	\$50,014	FEMA, Project Bread & Donations
Som. Homeless Inf/Ref	\$14,025	\$28,416	Donations
Som. YMCA	\$7,230	\$12,000	Partners w/Youth, American Honda, Agency Match & Private foundations

Agency	Awarded 09-10	Match Amount	Match Source
Som. YMCA CIT/LIT	\$25,000		
Transition House	\$2,394	\$17,400	Kent St Housing Partnership
Wayside Youth & Fam	\$4,000	\$16,550	SAMHSA/CSAP Grants
Welcome Project	\$4,250	\$10,000	Foundations, Som. Family Network & Fees
Som. Arts Council	\$9,800	\$9,800	MA Cultural Department, Local Businesses & Corporations
Som. Council Aging	\$31,643	\$32,000	Title III B-D, Executive Officer of Elder Affairs
Som. Disability Com	\$42,000	\$2,000	Walnut St Center & SCAT
	\$430,251.95	\$1,075,628	

ESG Agency Match Contributions:

Table 23: ESG Agency Match Contributions

Agency	Awarded 09-10	Match Amount	Match Source
CASPAR, Inc Com	\$23,955	\$25,200	MIT in Kind & CASPAR Overhead
Catholic Charities	\$13,225	\$15,500	Dept of Trans. Assistance, Camb Foundation, Ruth Farrissey Trust
Respond Inc	\$30,500	\$58,500	Dept of Children & Families, & Donations
Som Homeless Coalition	\$53,725	\$198,000	Dept of Trans. Assistance, College Ave Methodist Church, FEMA & Donations
Transition House	\$2,394	\$31,400	Kent St Housing Project & US Dept of Housing
	\$123,799	\$328,600	

Housing Division Matching Contributions:

Table 24: Housing Division Match Contributions

Private Funds for Housing Rehabilitation	\$6,860	Homeowners' own funds
Private Funds for Down Payment/Closing Cost	\$108,612	Homebuyers' own funds
Private Mortgages for First Time Homebuyers	\$978,693	Public & Private Lending Institutions
Private Mortgages for Housing Developers	35,048,066	Public & Private Lending Institutions

Home Matching Contribution:

All HOME funds require a twenty-five percent (25%) match from non-federal sources except for Administration funds (AD), Community Housing Development Organization Operating funds (CO), Program Income funds (PI), and all 1992 funds. Match obligation is incurred as HOME funds are drawn down from the Federal Treasury into the City's account. Match obligation is incurred whether or not the activity is complete. The City drew down \$745,714 of HOME and HOME PI funds during the program year. Excluding \$80,151 of AD and CO funds and \$111,027 of PI funds drawn, the amount requiring the 25% match was \$462,901 for a match liability of \$115,725.

The City was able to report \$1,138,717 of match this period which it received in the form of the value of appraised land/real property contributed to four (4) Inclusionary Housing units sold to

households at 80% AMI, and from a pro-rated share of the value of a grant from non-federal sources given to the VNA Conwell Capen Senior Living Community for solar collectors.

Parks & Open Space Matching Contributions:

Transportation & Infrastructure Matching Contributions:

GREEN LINE PLANNING	\$ 15,222.56
ASSEMBLY SQUARE	\$ -
EAST BROADWAY STREETScape	\$ 123,003.29
ADA STREETScape IMPROVEMENTS	\$ 66,422.50
STREET TYPE PLANTING PROGRAM	\$ 77,145.00
Total Transportation & Infrastructure	\$ 281,793.35

Open Space:

DURRELL PARK RECONSTRUCTION & DESIGN	\$ -
HARRIS PARK DESIGN	\$ 8,249.80
KEMP NUT PARK	\$ 6,173.82
CAMBRIDGE HEALTH ALLIANCE REMEDIATION	\$ -
111 SOUTH STREET	\$ 1,600.00
O WASHINGTON STREET	\$ 40,214.20
SOMERVILLE COMMUNITY PATH/JUNCTION	\$ 400.00
DICKERMAN PARK	\$ 22,000.00
MORSE KELLY	\$ 22,000.00
Total Parks & Open Space	\$ 100,637.82

Economic Development Matching Funds:

Table 27: Economic Development Match Contributions

Economic Development: MCC Grant for Arts Union	\$20,000.00
Micro-Enterprise Asst (Accion, USA)	\$64,344.68
	\$84,344.68

CITIZEN PARTICIPATION SUMMARY

As outlined in both the Five Year Consolidated Plan and the One Year Action Plan, the City of Somerville follows a public participation plan designed to solicit citizen input, while at the same time helping to inform the public of resources, emerging needs, and restrictions and limitations of available resources.

Besides the public hearings held during the program year, the City had broad discussions of the One Year Action Plan process within open committee meetings and Board of Aldermen meetings.

During the 2008-2009 HUD year the City of Somerville held 4 public hearings and many other focus groups in order to develop the City's 2008-2013 Consolidated Plan. Outreach for these programs included hearing notices in local newspapers (including non-English speaking newspapers), announcements on the City's website, video showings of public hearings on the local access cable channel, and other announcements to interested persons and groups.

Moving forward into program year 2010-2011, the City of Somerville will look to continue the public participation process through outreach to potential interest groups and constituencies, and through increasing the number of public forums with which to gather input into the City's HUD funded programs. The City may consider continuing its use of focus groups as a means to gather important input into the design of future programs and projects.

For program year 2009-2010 CAPER, the City of Somerville made available drafts of this document in the following locations: OSPCD's Office, City Clerk's Office, and City Hall Annex. A public hearing was held on Tuesday, September 21, 2010 at the Ralph & Jenny Center at 9 New Washington Street. This public hearing was advertised in the local newspaper. No comments were received concerning this CAPER.

APPENDIX

Financial Summary
CAPER Public Hearing Notice
PRO3 Report
PRO2Report
Map
HOME Detail
HOME Form 40107
HOME Program Income Expensed
HOME Form 40107A