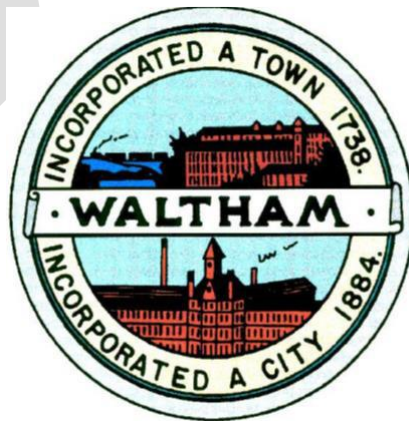


COMMUNITY DEVELOPMENT BLOCK GRANT
Consolidated Annual Performance Evaluation
Report | 2022-2023 Program Year



Prepared by the City of Waltham Planning Department



THIS DOCUMENT IN ITS ENTIRETY IS A DRAFT. The contents within this document are not to be considered FINAL until notice of approval is received from the United States Department of Housing and Urban Development.

Comments will be accepted through September 9, 2023 via

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CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)

The City of Waltham, through a collaborative process with members of the community, established a viable vision for the future through the development of a 5-Year Consolidated Plan for the Community Development Block Grant (CDBG) Program. The most recent update was approved by the U.S. Department of Housing and Urban Development (HUD) in November, 2022 and published by the Planning Department. The update, titled the CDBG Annual Action Plan unveiled the City's priorities, goals and expectations for a one-year period (July 1, 2022 – June 30, 2023).

In accordance with Title 24 Code of Federal Regulations (24 CFR) Part 91, each community in receipt of CDBG funding must complete a Consolidated Annual Performance Evaluation Report (CAPER) within 90 days from the close of the community's Program Year (PY). Waltham's most recent completed PY ended June 30, 2023. This CAPER details the specific accomplishments and goals achieved through the year to meet the objectives outlined in the Program Year 48 2022-2023 Annual Action Plan. The Planning Department is responsible for preparing the CAPER on behalf of the City of Waltham and its community partners.

Priority categories for CDBG funding in 2022, or PY48 were determined during the development of the 2020-2025 Five-Year Consolidated Plan. The total funding amount in PY48 was \$887,030 broken down into the following categories:

Social Services: Funding for 12 nonprofit organizations providing social service and public service activities to underserved populations in Waltham.

Public Facilities: Funding to improve major infrastructure components, Americans with Disabilities Act (ADA) accessibility upgrades, and overall sustainable improvements to public facilities serving low and moderate-income people.

Housing Rehabilitation: Interest free loan funding to homeowners and nonprofit organizations for rehabilitation of owner-occupied and renter-occupied housing.

Program Administration: Funding towards costs associated with administration and management of the overall CDBG program by Waltham staff.

Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward

meeting goals and objectives. 91.520(g)

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

Goal	Category	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Administration	Affordable Housing Public Housing Homeless Non-Homeless Special Needs Non-Housing Community Development	Other	Other	N/A					
Provide Accessible & Sustainable Improvements	Non-Housing Community Development	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	5,000	2,273	45%	1,000	90	9%
Provide Diverse Public Services	Homeless Non-Homeless Special Needs Non-Housing Community Development	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	12,500	12,956	103%	2,500	4,379	175%
Provide Rehabilitation Housing Assistance	Affordable Housing	Homeowner Housing Rehabilitated	Household Housing Unit	15	7	47%	3	2	67%
Provide Rehabilitation of Rental Units	Affordable Housing Public Housing	Rental units rehabilitated	Household Housing Unit	10	6	60%	2	0	0%

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

Assess how the jurisdiction's use of funds, particularly CDBG, addresses the priorities and

specific objectives identified in the plan, giving special attention to the highest priority activities identified.

In Program Year 48, the City used CDBG dollars to fund objectives identified in the 2020-2025 Five Year Plan – specifically to fund projects that positively impact low- and moderate-income people and activities located in the Southern Neighborhood District.

PY48 Project Descriptions:

Social Services: As with prior years, one of the highest CDBG priorities was funding social service programs that provide a diverse array of services to low- and moderate-income people. During the 2022-2023 Program Year, the City allocated \$133,054 to fund 12 non-profit organizations providing public services including after school programs, English as a second language (ESL) instruction, homeless prevention services, and emergency assistance programs. The Planning Department established the annual goal of assisting 2,500 persons with social service funding and overall, 4,379 low-moderate income people were served through the Social Services programs in PY48.

Accessibility Improvements: The City is focused on improving infrastructure at the Beaverbrook Senior Apartments site: a 60-unit public housing development serving elderly and disabled residents at or below 50% of the City's AMI. The site, built in 1958 consists of 15 buildings with connecting walkways and a shared roofing system. Specifically, the project is utilizing \$400,000 in CDBG funds, \$400,000 in HOME funds, and \$800,000 in MA Department of Housing and Community Development (DHCD) High Leverage Asset Preservation Program for Local Housing Authorities (HILAPP) State funds. The project, is currently in the schematic design phase is being managed by the Waltham Housing Authority (WHA) with assistance from the City.

Work, Community, Independence was allocated \$61,850 for the addition of a handicap ramp and expanded handicap parking. Work, Community, Independence provides services to individuals with physical and development disabilities making this project crucial for the safety and accessibility of clients and bolstering the City's identified 5 Year Plan goals of assisting residents with disabilities. This project is anticipated to be complete by the end of the year 2023. The project has not yet begun due to a process to increase the budget using prior year program income so that the project could commence.

New ADA Accessible Playground and Restroom: The City allocated \$269,570 for the installation of a new accessible playground and a compostable restroom at the former Fernald Development Center campus. These two projects are anticipated to go out to bid in 2023.

Section 108 Loan Repayment: Annual repayment to HUD of \$220,000 for the creation of a multi-use public park at the former Woerd Avenue Landfill.

Housing Rehabilitation: The CDBG Housing Rehabilitation program provided \$57,000 to go towards

interest free deferred loans to low to moderate income homeowners.

CR-10 - Racial and Ethnic composition of families assisted

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

91.520(a)

	CDBG
White	3,003
Black/African American	1,115
Asian	128
Native American	5
Multi-Racial	220
Total	4,471
Hispanic	2,144
Not Hispanic	2,327

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

Narrative

In PY48, the ethnicities of CDBG program participants were representative of Waltham's diversity. 48% of the CDBG program participants were Hispanic and 25% were black. In order to help address challenges faced by many residents, and since almost half of the program beneficiaries are Hispanic, several of the CDBG programs offered are tailored toward Spanish speaking families. Specifically, funding for organizations providing education in the community such as Latinos en Accion and Friends of the Waltham Family School provide English as a second language (ESL) instruction for residents of Waltham, many of which whom have only been recently living in the US.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	\$887,030	\$822,556.67
Section 108	public - federal		\$235,157.69

Table 3 - Resources Made Available

Narrative

The CDBG Resources Made Available value is the amount of allocated funding for the program in PY48. CDBG Expenditures are an accumulation of 2022-2023 and prior program year project funds. The full Section 108 loan amount from the 2020-2021 program year (PY46) for the Woerd Ave Landfill Revitalization was for \$4,195,000. The PY48 CDBG allocation of \$220,000 went directly towards the Section 108 loan payoff.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Southern Neighborhood District	76.66%	76.66%	66% of projects funded in 2022-2023 were located in locally identified Target area. This number comes to 76% with the allocation of the prior year funds for Beaverbrook ADA improvements which was approved in 2022-2023.

Table 4 – Geographic distribution and location of investments

Narrative

The data above is consistent with the research the Planning Department has conducted in order to strategically fund and deploy resources to the most vulnerable populations. The Southern Neighborhood District is recognized by the City as a target area for CDBG allocations due to several combining factors based on US Census and City data. In the Southern Neighborhood District, notably, 55% of residents are low-moderate income, most public service organizations are located within the district, and a majority (±72%) of the City's federal and state subsidized housing units are located in the district. The Southern Neighborhood District has the largest concentration of foreign-born citizens and multi-family dwellings in Waltham. Further, a majority of the City's affordable housing and public housing units are located within this diverse, multi-family district.

The majority of overall CDBG funds in 2022-2023 have been allocated towards projects in the Southern Neighborhood District. However, funds allocated outside of the Southern Neighborhood District still target historically disadvantaged populations such as projects to improve ADA accessibility or that are within low-income housing developments. Specifically, two public facilities projects at the Fernald site are outside of the Southern Neighborhood District. Both of these projects will go towards developing a playground and compostable restrooms that will be ADA accessible in order to serve historically disadvantaged persons with mobility limitations. Other projects outside of the Southern Neighborhood District included Chesterbrook Gardens WHA development and at Opportunities for Inclusion – an organization serving people with physical and developmental disabilities.

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

The City of Waltham bolsters federal funding with State, HOME Investment Partnership Program (HOME), Community Preservation Act (CPA), and local funds in addition to City-owned land to leverage CDBG projects and community development initiatives.

The HOME funds awarded to Waltham through the WestMetro HOME Consortium provides monetary leverage for the City. HOME funding is used for tenant based rental assistance (24 households assisted with TBRA in 2022-2023) which is managed by the City's Housing Division. In addition, State MRVP Vouchers through the Waltham Housing Authority provide an approved MATCH for the HOME Program annually (\$238,901 MRVP match in 2022-2023).

The accessibility upgrades project at Grove St./Beaverbrook Apartments is fully leveraging a diverse funding stream of State, federal, and local sources to finance the project. Specifically, the project is utilizing \$400,000 in CDBG funds, \$400,000 in HOME funds, and \$800,000 in MA Department of Housing and Community Development (DHCD) High Leverage Asset Preservation Program for Local Housing Authorities (HILAPP) State funds. The project, is currently in the schematic design phase and is expected to go out for bid in October, 2023 with final completion in May of 2024.

CPA funds are used to support affordable housing, community development, accessibility/facility upgrades, and related projects. In the 2022-2023 program year, the City approved CPA funds to go towards the designs for two window replacement projects at WHA properties: the Arthur Clark Apartments and the Winchester Crane Apartments. Each project received a combined \$200,000 for window replacements in apartment complexes totaling 179 units. In 2022-2023, \$4,012,000 in CPC funding went towards the acquisition of 0 Prospect Hill Rd/1A Willard Street. This acquisition by the City of undeveloped land was enacted to preserve access to Prospect Hill Park – a source of open space and recreation for residents. These undeveloped parcels were bought by the City in order to protect them from being purchased by a private seller thus risking development of the parcels which would have the effect of cutting off access to Prospect Hill Park. CPA funds are also going towards the exterior renovations at 342-344 Warren Street. This historic property has originally been used as a working farm and the CPA

project is intended as a phase I of a historic renovation project to rehab the building and preserve the property for urban farming activities. CPA funds overall leverages federal funding by allocating local resources to support affordable housing/community development in addition to renovating City-owned properties to address 5 Year Plan identified community development needs.

Waltham addresses affordable housing needs by reusing underutilized properties to support the creation of affordable housing. The City is currently in the process of renovating a surplus building that was part of the former Fernald Development Center into two new affordable units. Specifically, the City funded \$1,179,000 in Municipal Affordable Housing Trust dollars to conduct exterior renovations at the Cardinal Cottage building at the Fernald site with the goal of creating two new affordable units. This historic building is slated to be fully renovated by 2024 and will add much-needed affordable housing to North Waltham. The Cardinal Cottage will be added to the roster of other City-owned buildings that offer affordable housing including the Hardy Apartments for senior citizens; which was a former school building.

CR-20 - Affordable Housing 91.520(b)

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

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

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	5	2
Number of households supported through Acquisition of Existing Units	0	0
Total	5	2

Table 6 – Number of Households – Rental Assistance

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

The City of Waltham, through its Housing Division, provided two zero-interest rehabilitation loans to eligible Waltham property owners to preserve both rental and owner-occupied housing in order to improve the safety and affordability of the City's housing stock.

The Housing Division also manages a separate tenant based rental assistance program (TBRA) to offer security deposit assistance to low-income tenants and rental assistance to assist in homeless or households at-risk of homelessness into stable housing. Rental assistance programs assist in transitioning homeless or households at-risk of homelessness into stable housing. In PY48, the TBRA program assisted 24 households.

The City was three households short of its rehabilitation loan program goals in 2022-2023. The City received less applications for rehabilitation loans which could be in part to increased construction pricing of renovation projects. Since each rehabilitation loan project is capped at \$10,000, the applicants would need to fund the difference if the project is over \$10,000.

Discuss how these outcomes will impact future annual action plans.

The City continues to remain committed to addressing the dual challenge of increased housing demand and rising property values in Waltham. The City supports affordable housing production both through subsidized development and private development through the City's Inclusionary Zoning Ordinance and 40B projects. Future action plans will continue to focus on ways to support affordable housing through the CDBG program, CPA funding, re-purposing City-owned properties in addition to other funding sources and City initiatives.

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

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

Table 7 – Number of Households Served

Narrative Information

Supporting low and extremely-low-income families in Waltham is referenced in the Five-Year Consolidated Plan, and a priority of the City's CDBG program. The lowest-income families in Waltham are in need of the most assistance and are at a greater risk of losing their homes and facing subsequent homelessness.

The Housing Rehabilitation Loan program, administered by the Housing Division, allows low-income families to rehabilitate their homes, which in turn avoids prevents health and safety housing issues associated with building deterioration effects. Waltham also partners with non-profit organizations that

own affordable housing in Waltham such as the WHA and Waltham Committee Inc., a private housing partner providing units for disabled individuals for the housing rehabilitation program.

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

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

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

Homeless services for the City are delivered via a community based network of organizations that work together to assist homeless families and individuals moving toward self-sufficiency. The City, the Community Day Center, the Middlesex Human Service Agency (MHSA) in partnership with the Waltham Police Department's (WPD) Homeless Task Force perform outreach activities to the homeless population in Waltham.

While the City of Waltham does not receive Emergency Solutions Grant (ESG) funds, Waltham is an active participant in the CoC and supports ESG activities, standards, and consultation processes. In addition, Planning Department and Housing Division staff engage in ESG application review for projects within the former Brookline-Newton-Waltham-Watertown (BNWW) Continuum of Care (CoC). Social Service organizations within Waltham can access ESG funds through the City of Newton, which administers ESG funding. ESG/Balance of State CoC program updates are detailed in WestMetro HOME Consortium meetings that Planning Department and Housing Division staff attend. Planning Department and Housing Division staff also attend meetings of the Balance of State and provide input on Waltham's unmet needs and strategies for funding.

In March 2023, the City attended the Waltham Community Leadership Group Housing Summit sponsored by Chaplains on the Way – a social service organization providing mental health services and referral services to homeless individuals in Waltham. The goal of the meeting was to build community between housed and un-housed residents and address collective issues around homelessness and the need for affordable housing.

The City's Housing Division also conducts the annual Point in Time Count with the WPD Homeless Task Force facilitated by the Balance of State CoC, MHSA, and the Community Day Center. This information provides estimates of unsheltered homeless individuals in order to get data on the prevalence of homelessness to help inform future assistance levels and support outreach to homeless persons and their needs.

Individual contacts were made through the WPD, MHSA, and the Community Day Center for at risk individuals and referred to the Housing Division for resources that could provide housing assistance. The communication between each individual agency (private and municipal) provides the City with a better understanding of where to refer the individuals seeking assistance and/or housing. Many of the Waltham homeless providers communicate weekly as well, and provide information on the services these individuals are seeking from public institutions and non-profit organizations.

Addressing the emergency shelter and transitional housing needs of homeless persons

The CDBG program in PY48 allocated \$54,631 specifically to homeless shelter and food pantry programs.

In PY48, the City funded \$26,745 to the MHSA for its Bristol Lodge shelter, Mary's House shelter, and Soup Kitchen program. The Bristol Lodge homeless shelter and transitional housing programs operate out of a surplus City-owned building to serve Waltham's homeless population. The shelter is located on Lexington Street and provides overnight shelter to 60 individuals year-round on the second floor of the building. The first floor is utilized by the City as a garage bay for retired historic fire engines.

The Community Day Center provides homeless shelter services, meal services, and case management for people experiencing homelessness in Waltham. The Community Day Center received \$20,633 in PY48.

The Salvation Army, awarded \$14,506 in PY48 operates a Soup Kitchen program serving homeless and low-income people.

Waltham provided \$100,000 in funding for a weekend winter warming Triage Center managed by the Community Day Center from January 2023 through March 2023 for homeless individuals who were not eligible to stay in other shelter systems due to a current addiction issue. The Community Day Center provided staffing, and each guest was triaged to ensure that individuals had access to health care, permanent housing applications, food, and assistance to complete applications for any state services they would be eligible for. 15-20 individuals were sheltered on average by this program, who would have otherwise been outside in the elements in harsh winter conditions.

The City works with the CoC, which has discharge policies in place mandated by the State for individuals leaving foster care, health care, mental health care and correctional facilities. The CoC is aware of Waltham's programs, shelters and housing services, and is able to refer individuals meeting the criteria for both the emergency assistance program and the rental assistance program.

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

Multiple entities in the City offer homeless prevention services that include rental assistance, fair housing services, utility assistance, and social service programming. The Housing Division HOME TBRA Rental Assistance program is able to assist the transitional needs of homeless persons by providing rental assistance to individuals being referred from publicly funded institutions and systems of care. The Community Day Center and MHSA Bristol Lodge shelter refers homeless individuals to the Housing Division throughout the year to initiate permanent housing for eligible individuals providing a bridge into

public housing. The Waltham Housing Authority also refers individuals to the Emergency Assistance Program that are receiving public assistance in order to avoid becoming homeless and potentially lose public assistance vouchers. Lastly, the Salvation Army operates an emergency utilities assistance program that helps low-income people with their utility bills.

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

A variety of efforts are undertaken by the City and social service organizations to prevent homelessness in Waltham. Services provided through multiple entities include food and meals programs, emergency rental assistance, financial assistance, fuel/utility assistance, counseling/advocacy, and legal assistance. Waltham provides CDBG Public Service funding for ESL Classes and workshops focused on financial literacy and housing policies which has helped individuals and families obtain and retain housing and avoid becoming homeless. The City also provides CDBG Public Service funding to MHSA specializing in finding permanent housing for men, women and families entering their shelters. MHSA provides trained staff and clinicians to assist in the search for permanent housing. This service is part of the \$26,745 in CDBG funding MHSA received in PY48. CDBG funding (\$20,633) in PY48 has allowed the Community Day Center to provide additional case management for homeless individuals seen by the Center. The Salvation Army received \$7,253 in CDBG funding to provide utility assistance to low to moderate income individuals and families to avoid shut off. Supportive actions by the Housing Division such as outreach to the Court system to advise and provide support and funds to families and individuals has also proven successful in preventing evictions for these households.

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

Actions taken to address the needs of public housing

One of the largest priorities of the City is to preserve existing affordable housing in Waltham. This requires coordination with the Waltham Housing Authority – the largest affordable housing provider in Waltham which administers MRVP vouchers and maintains 810 units.

In order to support the preservation of existing affordable housing, the City has utilized CDBG funding for capital improvement projects at WHA properties. In PY48, the WHA has begun work on the accessibility upgrades project at Beaverbrook Senior Apartments. This project is currently in design and is expected to conclude in May of 2023.

As referenced in the Leveraging section in CR-15, In the 2022-2023 program year, the City approved \$400,000 in CPA funds to go towards the designs for two window replacement projects at WHA properties: the Arthur Clark Apartments and the Winchester Crane Apartments.

In PY48, CDBG Public Service funds supported non-profit after school programs for youth living in WHA properties. Specifically, the Chesterbrook Learning Center, and Prospect Hill Community Foundation offer educational programming for at-risk youth. These organizations each received \$6,346 in CDBG funds. These afterschool programs provide homework help and enrichment activities for youth in each development. These Learning Centers are equipped with computers which are accessible for the children and parents. The organizations also allow people to use the computer stations for resume building, applying for job searches, and general communication.

The City of Waltham and the WHA have regularly collaborated on projects to repair and improve public housing properties with and without CDBG funding. **Actions taken to encourage public housing residents to become more involved in management and participate in homeownership**

In Waltham, public housing residents may participate in the management and operations of the Waltham Housing Authority by attending Board of Commissioners meetings. These Commissioner meetings cover important matters concerning WHA management including policy decisions, budgets, and planning actions. The Board of Commissioners meetings provide opportunities for residents to address the Board and ask questions and provide input. The WHA is required to have one of its residents sit on the Commission and the resident Commissioner has one of five votes to determine policy and procedures for the WHA and represents residents' interests in the decision-making process. Additionally, the WHA maintains a Resident Advisory Board, comprised of federal Public Housing residents and Section 8 participants. This Board meets twice a year to discuss proposed capital improvement projects and the application of federal funds. At these meetings, the residents have an opportunity to make proposals regarding the use of funds for the needs of the residents.

Actions taken to provide assistance to troubled PHAs

The Waltham Housing Authority is not a troubled PHA. The City of Waltham has not assisted any troubled PHA's during this program year.

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

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

The largest barrier to affordable housing Waltham residents experience is the constant increase in housing costs. The City of Waltham, much like all of eastern Massachusetts has experienced year- over-year sustained surges in median home prices. The February 2023 median home listing price in Waltham was \$789,450, versus \$649,900 in February of 2022, which is an increase in over 21 percent (realtor.com). This unaffordability of homes is felt by potential first-time homebuyers, low-moderate income individuals/families, and disadvantaged groups.

The City of Waltham continues to experience barriers to affordable housing, ranging from high land and construction costs to regulatory constraints and economic disparities. While these challenges are shared with neighboring municipalities, Greater Boston in addition to New England as a whole, the City is fortunate to have strong working relationships with the members of the WestMetro HOME Consortium and the local Waltham Housing Authority.

As referenced in CR-15 the City leverages surplus publicly owned buildings to support affordable housing. Specifically, the City funded \$1,179,000 in Municipal Affordable Housing Trust dollars to conduct exterior renovations at the Cardinal Cottage building with the goal of creating two new affordable units. The Cardinal Cottage will be added to the roster of other City-owned buildings that offer affordable housing including the Hardy Apartments for senior citizens; which was a former school building.

In addition to supporting WHA projects, CPA funds are also allocated throughout the City for both private and City-owned affordable housing projects. In May 2023, a \$6M contract was signed to begin the Leland Homes Redevelopment using CPA funding. This project will create 66 apartments at 60% AMI for senior citizens in Waltham. This project was originally approved for CPA funding in August 2021.

Waltham also works to increase production of affordable housing through approval of both special permit and comprehensive permit projects to provide zoning relief to new construction of multi-family properties.

Waltham works to increase production of affordable housing through approval of both special permit and comprehensive permit projects. In 2018, the City Council began the process of amending the Inclusionary Zoning Ordinance to provide a percentage of housing developed through the ordinance to households earning 50% of the area median income. This amendment increased the percentage of affordable units from 10% to 15%. The additional 5% of units are made available to households at 50% of the AMI.

In 2022-2023, the City conducted 7 City Council Special Committee Public Input Meetings in each of the City's Wards to solicit input on community development goals including housing creation and barriers to affordable housing as part of its process to update its Master Plan. In addition, targeted Master Plan input sessions were held with City Departments, Waltham senior citizens, Waltham veterans, and social service/non-profit organizations. The goal of the updated Master Plan will be to identify and address barriers to affordable housing in addition to recommending best practice land use, tax policies, zoning ordinances, building codes, and other policies. These meetings began in September 2022 and are continuing into 2023. Comments have been received but are still being evaluated with the data to be compiled for use in the next phase of the Master Plan update. Some of the feedback received to date is in line with 2020 – 2025 Consolidated Plan goals and affordable housing priorities such as the need for more affordable housing and more resources dedicated to Waltham's southern neighborhood district.

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

The City works with local social service agencies to reduce the number of families and individuals living in poverty. These include family stabilization services, affordable child care, teen job readiness programs, etc. Specifically, the Waltham Housing Authority Learning Centers provide afterschool tutoring and mentoring programs to low-income children living in public housing. The Salvation Army Kids Feast provides food, educational help, and encouragement to children of parents who may not be able to afford private after school care. Friends of Family School provides English classes to non-native English speakers so when kids are in school, they are able to speak and understand English and keep up with classroom activities.

In 2022-2023, Waltham coordinated with the non-profit Healthy Waltham to utilize the City's Government Center building as the site for a food pantry that the organization runs.

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

During PY48, the City of Waltham continued to make lead paint abatement, the removal of asbestos, and the mitigation of related health hazards a priority of the Housing Rehabilitation program. The use of CDBG funds allows deferred de-leading loans and grants to owner-occupiers of multifamily properties. Additionally, the City is a member of the WestMetro HOME Consortium, which requires the abatement of lead paint in all new construction and rehabilitation of low-moderate income housing.

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

Planning Department and Housing Division staff administer the CDBG and HOME programs. The funds from these federal programs are used locally for programs and projects that target and provide the maximum benefit to LMI persons. These resources provide rental assistance, housing stabilization and

relocation services, access to emergency shelter, and support for the creation and preservation of affordable housing. Funding for food, after school care programs, and educational programs also provide additional support to households facing poverty in the City.

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

The City continues to focus on trainings and webinars, making a conscious effort to remain up to date and in compliance with HUD regulations along with other State and local requirements. During the desk monitorings conducted in 2022-2023, the City mandated that subrecipients attend informal CDBG training webinars lead by the Planning Department. These webinars were on CDBG grant program management and were conducted to help both new and regular sub-recipient staff on reporting and management requirements.

Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)As referenced in CR-25, the City of Waltham partners with the Community Day Center by providing \$100,000 in City funds for the Day Center's Winter Warming Center to give unhoused people a place to stay during cold winter nights.

The WHA and several social service organizations coordinate to promote shared goals such as anti-poverty measures and advancing educational attainment of residents. Specifically, the Prospect Hill Community Center began operation at the WHA owned Prospect Hill Housing Development. The Community Center is an independent 501(c)3 staffed by volunteers from Brandeis and Bentley Universities in an effort to provide services to residents living within the development. Student leaders from Brandeis and Bentley work with the Prospect Hill Tenants Association to develop programs for the Center, which include after school activities, tutoring, computer programming classes, ESL instruction, fitness and health education, arts, and resumé writing and job skill training.

The Housing Division maintains partnerships and relationships in order to enhance coordination between service providers. Strengthened collaboration with organizations like the WHA, human service providers, housing providers, regional entities, and private landlords play a critical role in ensuring the cost-effective, efficient delivery of services to the public. Since many housing rehabilitation applicants are economically disadvantaged, elderly, and/or in need of social services, Division staff regularly consult with the Waltham Senior Center and the Health Department.

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

The high cost of housing, development, and land acquisition, and in addition to the lack of available land for new development limits opportunities for diverse siting of affordable housing and housing choice. Housing options are limited as a result of the overall shortage of affordable and accessible rental units and extremely low vacancy rates of such units throughout the City. The Common Housing Application for Massachusetts Programs (CHAMP) housing application administered through the State has increased the

wait list for State assisted public housing in Waltham taking away the local preference for Waltham residents. This has led to wait times for State units increasing from 2-3 years to up to 6-year wait period. The age of housing stock, combined with the existence of lead paint hazards and limited financial resources for lead paint abatement reduces housing choices for families with young children.

In 2022-2023, Waltham, through the WestMetro HOME Consortium signed a contract with Suffolk University Law School to engage in a Fair Housing Testing analysis throughout the Consortium communities. From the results of this analysis, Waltham Planning Department and Housing Division staff will gain quantifiable insight on barriers to housing that housing voucher holders, low income, and minority residents face in the Greater Boston area.

The Waltham Housing Division's HOME TBRA rental assistance program helps to overcome fair housing choice impediments. Applicants are free to search for housing within Waltham or within the HOME Consortium and Balance of State Continuum of Care (CoC) if the household cannot find housing of their choice in Waltham. The Housing Division also administers a CDBG housing rehabilitation program for lead paint abatement, weatherization, and accessibility improvements to assist low-moderate income homeowners and renters. This program helps invest in Waltham's existing housing stock and supports low-moderate income residents through zero-interest deferred loans. In 2022-2023, the housing rehabilitation program budget was \$27,000.

The Municipal Housing Trust also helps to overcome effects of impediments by promoting and financing affordable housing opportunities in Waltham.

Waltham's Council on Aging/Senior Center provides an informational workshop annually for seniors on housing options, home modification, subsidized apartments, assisted living facilities and nursing homes.

CR-40 - Monitoring 91.220 and 91.230

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

Each year CDBG subrecipients are monitored for progress and compliance with applicable laws and regulations. Monitorings are conducted to ensure that sub-grantees are keeping required documentation on file, accomplishment data is accurate, and that sub-grantees are in compliance. The Planning Department publishes the monitoring guidebook and subrecipient guidebook and distributes these to every social service organization that receives funding. Monitorings are done on site at the location where the subrecipient operates or through desk monitorings. In order to determine if they are in compliance with the terms and conditions of their Subrecipient Agreement, each organization is required to submit a quarterly report that contains statistical data on accomplishments and performance for the quarter and year-to-date.

In Year 48, remote desk monitorings were conducted for all CDBG social service sub-recipients. For the desk monitoring, the City required sub-recipients to send copies of participant income verification forms from a fiscal year quarter so that the City could cross reference with submitted accomplishment report data. Once this backup data was sent to the City, the City could determine whether the income verification forms match the accomplishment report data so that the National Objectives are properly documented.

The Planning Department continued its focus on the anti-discrimination and equal access policies. This ensures long term compliance with the requirements of the program. The Planning Department works with the Massachusetts Office of Diversity in order to include minority and women owned businesses in the procurement of capital projects and future planning of capital projects. Furthermore, each construction project is monitored for Davis Bacon compliance and payrolls are checked prior to any payments being made.

Citizen Participation Plan 91.105(d); 91.115(d)

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

The City of Waltham is following a detailed Citizen Participation Plan which:

Provides for and encourages citizen participation, with emphasis on participation by residents of low, very low, and extremely low income, including minorities and non-English speaking persons, as well as persons with mobility, visual, or hearing impairments in all stages of the process;

Provides citizens with reasonable and timely access to local meetings, information, and records relating to the City of Waltham's proposed and actual use of federal funds, as required by the regulations;

Provides for conveniently timed and located public meetings in the Arthur J. Clark Government Center to obtain citizen views and to respond to proposals and questions at all stages of the community development program, including at least the development of needs, the review of proposed activities, and review of program performance. Such hearings are held after adequate notice, at times and locations convenient to potential or actual beneficiaries, and with accommodation for people with disabilities;

Provides for a non-English speaking interpreter, should one be requested, for public meetings with non-English speaking participants;

Provides for participation with the Waltham Housing Authority to encourage the participation of public and assisted housing residents;

Provides for a timely written answer to written complaints and grievances, within 15 working days.

Additionally, each construction project is monitored for Davis Bacon compliance and payrolls prior to any payments being made. These payrolls can be accessed by the public at any time in either the Planning Department or the Purchasing Agents office.

The City also utilizes City social media accounts of Twitter and Facebook to promote all public meetings and outreach activities. Due to the COVID-19 pandemic, utilizing social media to advertise events has been very advantageous by easily disseminating City information that many residents may not be aware of via traditional outreach methods. Leveraging the many subscribers of these data platforms has proven valuable in casting a wide net to reach the many people that may not see or be aware of the local newspaper postings or the City of Waltham website. Specifically, the City of Waltham Facebook and Twitter pages have 13,000 and 7,650 followers respectively as of February August, 2023.

In PY48, the City continued to utilize video conference platforms to host all public hearings regarding the CDBG program. Originally used in 2020 with the onset of the COVID-19 pandemic, the City continued to utilize video conferences in PY48 in order to make public meetings more accommodating. These virtual meetings allow for interactive features such as screen sharing from Planning Department staff's computers, a chat message function where participants can both ask and answer questions, and allow participants to access the meeting anywhere.

CR-45 - CDBG 91.520(c)

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

In PY48, there were no significant changes to the City's CDBG program objectives.

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

No

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