



***The Town of Brookline  
FFY 2016 (FY2017)  
Consolidated Annual Performance  
and Evaluation Report  
(CAPER)***

**TOWN OF BROOKLINE**

Reporting Period: Fiscal Year FFY2016(FY2017)

July 1, 2016 to June 30, 2017

September 30, 2017

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Financial Summary Report

## CR-05 - Goals and Outcomes

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

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

Over the course of FY 2017, the Town served as the steward of federal CDBG funds, which were effectively administered to over fourteen subrecipients, including Town-affiliated agencies, non-profit housing and social service providers. As in past years, program success was measured by the extent to which subrecipients effectively met local needs as defined in their contracts, mirroring the priorities put forth in the Town's Consolidated and Annual Actions Plans. As of June 30th, the Town had a 1.16 program funding ratio.

**Public Facilities:** The Town's goal to enhance public facilities in a major corridor continued as part of the Gateway East project. After submitting revised plans to the Massachusetts Department of Transportation in May 2016, a design public hearing was held in April 2017. Plans are moving toward 75/100 percent design, with and 75 percent plans on target to be submitted to MassDOT in late September. Preliminary tasks related to right-of-way acquisition have been undertaken. The Gateway East project is on course for public bid in calendar year 2018.

**Affordable Housing:** Brookline's affordable housing policies and program reflect the Town's commitment in its Annual Plan to create and/or preserve rental and affordable housing. In FY 2017, Pine Street Inn's Beals Street project, which provides 31 units of "enhanced" single room occupancy (SRO) housing for extremely low-income households, was closed out. The Town's affordable rental housing preservation goals were met through the investment of CDBG and HOME funds toward capital project costs for housing units at a number of developments owned by the Brookline Housing Authority. The Town continued to serve income-qualified renters by working with developers of rental properties to provide units under the Town's inclusionary zoning requirements or through Chapter 40B Comprehensive Permits, which could result in a significant number of new affordable housing units serving households below 50, 80, and 100 percent of AMI over the next several years. In FY 17, a total of 85 affordable rental units received Town approval through the Comprehensive Permit (40B) process, including a 62 unit project to which the Town has made a preliminarily \$2.5 million commitment.

**Public Services:** Throughout the Town's history of receiving entitlement funds, the goal of providing public services to its residents has been a high priority. The Town's seven CDBG-funded social programs serve a diverse constituency and offer a wide array of services, ranging from employment resources to counseling and literacy. The Town continues to work with service providers to ensure that its most vulnerable citizens -- including youths, the elderly and those learning English as a second language -- have access to the services they need to thrive in the community.

**Supportive services to the homeless and at-risk of homeless:** In FY17, the Brookline Community Mental Health Center was awarded ESG funds to provide homeless prevention, rapid-rehousing, street outreach, and shelter services to individuals and families that were homeless or at-risk of homelessness.

**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	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Affordable Housing - Homebuyer Assistance	Affordable Housing	CDBG: \$0	Homeowner Housing Added	Household Housing Unit	6	0	0.00%			
Affordable Housing - Inclusionary Homeownership	Affordable Housing		Rental units constructed	Household Housing Unit	0	0				
Affordable Housing - Inclusionary Homeownership	Affordable Housing		Homeowner Housing Added	Household Housing Unit	0	0				
Affordable Housing - Inclusionary Rental	Affordable Housing	CDBG: \$0	Rental units constructed	Household Housing Unit	0	0		0	0	

Affordable Housing - Marian Street	Affordable Housing	CDBG: \$0	Rental units constructed	Household Housing Unit	16	13	81.25%	0	0	
Affordable Housing - Rehab Rental	Affordable Housing	CDBG: \$280000 / Center Communities of Brookline: \$150000	Rental units constructed	Household Housing Unit	0	0				
Affordable Housing - Rehab Rental	Affordable Housing	CDBG: \$280000 / Center Communities of Brookline: \$150000	Rental units rehabilitated	Household Housing Unit	31	273	880.65%	30	0	0.00%
Affordable Housing - Rehab Rental	Affordable Housing	CDBG: \$280000 / Center Communities of Brookline: \$150000	Homeowner Housing Rehabilitated	Household Housing Unit	0	0		0	0	
Affordable Housing - Rental Preservation	Affordable Housing		Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0				
Affordable Housing - Rental Preservation	Affordable Housing		Rental units rehabilitated	Household Housing Unit	273	665	243.59%			

Affordable Housing - Rental Preservation	Affordable Housing		Homeowner Housing Rehabilitated	Household Housing Unit	0	0				
Affordable Housing - Rental Preservation	Affordable Housing		Housing for Homeless added	Household Housing Unit	0	0				
Affordable Housing - Rental Preservation	Affordable Housing		Housing for People with HIV/AIDS added	Household Housing Unit	0	0				
Affordable Housing- New	Affordable Housing	CDBG: \$0	Rental units constructed	Household Housing Unit	0	0		32	32	100.00%
Economic Development	Non-Housing Community Development		Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	5000	5000	100.00%			
Homelessness Services	Homeless	Competitive McKinney-Vento Homeless Assistance Act: \$227274	Homelessness Prevention	Persons Assisted	100	114	114.00%	40	40	100.00%

Homelessness Services	Homeless	Competitive McKinney-Vento Homeless Assistance Act: \$227274	Other	Other	600	0	0.00%			
Public Facilities/Public Improvements	Non-Housing Community Development	CDBG: \$378425 / Town and Children's Hospital: \$440000	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	15000	12540	83.60%	5000	5000	100.00%
Public Services	Non-Homeless Special Needs	CDBG: \$201760 / Public Service Agencies: \$839152	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	2500	1560	62.40%	962	856	88.98%

**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.**

Overall in FY 2017, the Town succeeded in addressing priorities and specific objectives set forth for the fiscal year. The Town's continued support for affordable housing saw the completion of 31 rental units at two lodging houses at 51-53 and 55-57 Beals Street, which was occupied in the fall of 2016. The existing units were converted into 31 "enhanced" single room occupancy (SRO) units with small bathrooms and kitchenettes serving an extremely low-income population, some of whom were formerly homeless. The Town made a preliminary funding commitment for a new rental project – sponsored by Jewish Community Housing for the Elderly (JCHE). The new development will consist of 62 affordable senior

housing units at the site Temple Kehillath Israel. The Town's set aside of \$2.5 million in funding for the project will help to leverage many millions in other state, federal and private resources in the next year as the project moves toward closing and construction. This 100 percent affordable project is being developed by the Jewish Community Housing for the Elderly (JCHE) and will contain 62 affordable units for low- and moderate-income seniors. The Town will commit CDBG funding for acquisition of a long-term ground lease and anticipates that eleven of these units will be subsidized with HOME funds.

As in previous years, CDBG funding was allocated to the Brookline Housing Authority (BHA) to fund needed capital projects at its developments Town-wide. In FY 2017, \$250,000 was allocated to the BHA to fund safety and energy efficient improvements. After other projects were not able to advance, the Town reallocated an additional \$182,000 in unexpended CDBG funds from the 112 Centre Street (\$75,000) and the Affordable Housing Program (\$107,000) to the BHA's FY 2017 Resident Security, Playgrounds and Capital Improvements project (\$182,000). In addition, the Town continued to oversee the use of \$268,752 in HOME funds by the Brookline Housing Authority to support a rehabilitation project at the Trustman Apartments located at 144 – 156 Egmont Street, 337 – 347 St. Paul Street, and 144-156 Amory Street. HOME funds are being used to support the roof replacement and community room upgrade portions of the project. These activities are examples of the Town's continued efforts to preserve affordable housing.

CDBG projects funded in FY 2017 represent the second year of the Town's latest Five Year Consolidated Plan (2016-2020). The Town continued to carefully assess past needs with new requests for funding to ensure that identified goals and needs would continue to be met in the second year of the plan. The Town continued to meet the timeliness test, posting an unadjusted ratio of 1.16 at the end of the program year.

## 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)

	<b>CDBG</b>
White	595
Black or African American	142
Asian	110
American Indian or American Native	0
Native Hawaiian or Other Pacific Islander	0
<b>Total</b>	<b>847</b>
Hispanic	59
Not Hispanic	821

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

### Narrative

The numbers of individuals/families assisted by race and ethnicity during FY 2017 reflect those activities/projects that were completed by the close of the fiscal year. There are other on-going activities that are either in the permitting and planning stages or had not been completed by June 30, 2017, in addition to multi-year public facilities projects that are undergoing design review and approval by the Massachusetts Department of Transportation.

## 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	CDBG	1,361,534	1,237,184
HOME	HOME		
HOPWA	HOPWA		
ESG	ESG		
Competitive McKinney-Vento Homeless Assistance Act	Competitive McKinney-Vento Homeless Assistance Act	227,274	
Housing Trust Fund	Housing Trust Fund	100,000	
Other	Other	2,131,070	

**Table 3 - Resources Made Available**

### Narrative

The Town continues to find that the best way to maximize the formula grant funding it receives (CDBG and HOME) is to utilize it to leverage other local, state, federal and private dollars. The figures above reflect the Town's ability to encourage and participate in a process that leverages significant resources far and above the amount of Town-administered federal funding committed.

### Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description

**Table 4 – Identify the geographic distribution and location of investments**

### Narrative

There is no specific geographic distribution of federal funds or resources within the Town. Activities that receive Town-administered resources, including federal funding, have received commitments because the project met a local need and will achieve a strategic goal as set forth in the Consolidated Plan and relevant Annual Action Plan.

## Leveraging

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

HUD strongly encourages Entitlements to maximize the impact of CDBG funds at the local level by using federal dollars to leverage other resources and investment. For its part, the Town consistently echoes the importance of leveraging when funds are awarded to grantees during the Town's yearly competitive RFP process. Over time, applicants have come to understand the need to ensure program sustainability, and potential grantees receive favorable consideration for award if their programs and projects leverage additional resources. Depending on the nature of the project, CDBG funds and HOME funds have helped grantees to access Brookline Housing Trust funds, Town CIP and other private dollars from lending institutions and foundations.

For nearly a decade, Brookline worked with Pine street Inn (PSI) on strategies to improve and preserve two lodging houses located at 51-53 and 55-57 Beals Street. Managed by PSI under lease with the previous owner since 2004, the buildings were redeveloped into 31 "enhanced" single room occupancy (SRO) units with small bathrooms and kitchenettes serving extremely low- and very-low income formerly homeless individuals. The commitment from the Town consisted of \$170,400 in HOME funding, in addition to the \$829,234 from the Brookline Housing Trust and \$939,286 in CDBG funding. The project was completed and was almost fully occupied by the fall 2016.

Historically, requests from public service agencies for CDBG funding are two to three times more than the Town can fund given the fifteen percent cap on public services. Nevertheless, time and again, agencies have met these funding challenges by leveraging resources for their programs, which in FY 2017 was a 4 to 1 ratio. CDBG funding allocated for public services in FY 2017 was \$201,760, with upwards of \$800,000 expended as matching funds for public services.

## 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	31	31
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
<b>Total</b>	<b>31</b>	<b>31</b>

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	0	0
Number of households supported through The Production of New Units	0	0
Number of households supported through Rehab of Existing Units	220	484
Number of households supported through Acquisition of Existing Units	0	0
<b>Total</b>	<b>220</b>	<b>484</b>

Table 6 – Number of Households Supported

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

**Affordable Housing-New:** As noted, The Town made a preliminary funding commitment to a new rental project – sponsored by Jewish Community Housing for the Elderly. The new development will consist of 62 affordable senior housing units at the site Temple Kehillath Israel. The Town's set aside of \$2.5 million in funding for the project will help to leverage many millions in other state, federal and private resources in the next year as the project moves toward closing and construction. Although the units were not delivered in FY 2017, the Town spent considerable time working with the developer to permit the project under Ch 40B.

**Affordable Housing-Rental Rehab:** For nearly a decade the Town worked with Pine Street Inn on strategies to improve and preserve two lodging houses located at 51-53 and 55-57 Beals Street. The buildings had been managed by PSI under lease from the previous owner since 2004. Throughout FY 2016 and in early FY 2017, construction at Beals Street was undertaken in two phases. To ensure that no tenants were displaced, Pine Street Inn hired a relocation specialist to ensure that URLA procedures were followed. At the end of September 2016, the final drawdown of retainage was processed to close out the project. PSI's Beals Street project contains 31 units of enhanced SRO housing for extremely low-income households.

**Trustman project:** The Town continued to oversee the use of \$268,752 in HOME funds by the Brookline Housing Authority to support a rehabilitation project at the Trustman Apartments located at 144 – 156 Egmont Street, 337 – 347 St. Paul Street, and 144-156 Amory Street in Brookline, MA. The project started in FY 2016 and will continue into FY 2017.

**Public Services:** Historically, requests from public service agencies for CDBG funding are two to three times more than the Town can fund given the 15 percent cap on public services. Time and again, agencies have met these funding challenges by leveraging resources for their programs, which in FY 2017 was a 4 to 1 ratio. CDBG funding was \$201,760 and over \$800,000 was procured as a resource commitment from other sources.

**Affordable Housing- Inclusionary Rental:** The Town continues to serve income-qualified renters by working with developers of rental properties obligated to provide units under Section 4.08 of the Town's Inclusionary Zoning by-law, or through requirements of Chapter 40B.

**Affordable Housing-Homebuyer Assistance and Affordable Housing-Inclusionary Homeownership:** The Town currently manages a portfolio of over 160 affordable ownership units, developed through the Town's inclusionary zoning requirements, development projects, and its homebuyer assistance program, since the mid-1990's. As owners of existing affordable units decide to sell, Housing Division staff manage the resale process, including identifying new eligible buyers through affirmative marketing and lottery. Brookline utilizes an extensive list of outreach methods required for affirmatively marketing new affordable units to ensure that persons in the housing market who are not likely to apply for housing in Brookline have access to the information. In FY17, a total of nine affordable units were resold to income eligible buyers. No opportunities for new homebuyer assistance were available in this fiscal year.

### **Discuss how these outcomes will impact future annual action plans.**

With the recent conclusion of the two major developments (86 Dummer Street and 51-57 Beals Street) and a 64 unit 40B rental development at Marion Street, the Town will continue in FY 2017 to work to identify new affordable rental projects. Several projects are currently moving forward, including an affordable senior housing development sponsored by Jewish Community Housing for the Elderly and the Brookline Housing Authority's redevelopment of two large state-owned public housing projects serving low-income families.

As noted, JCHE, an area non-profit with a strong track record in providing housing for low-income seniors, received a approval under the state's 40B Comprehensive Permit Law to build 62 units of rental housing serving low-income seniors. The project has secured a preliminary \$2.5 million dollar

commitment from the Town and the sponsor will be working with the Town to leverage other public sources and private financing needed to support this important development project over the next several years.

In addition, because of market conditions, the Town is experiencing tremendous development pressure -- with a number of developers planning to build additional housing units. There are twelve Ch 40B developments before the Town in various stages ranging from early planning to final permitting. The Town will have at least three projects to administer under Inclusionary Zoning in addition to the numerous 40B development proposals, all of which will produce between 15 and 25 percent affordable units. These projects could produce a significant number of affordable units for the Town.

**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.**

<b>Number of Households Served</b>	<b>CDBG Actual</b>	<b>HOME Actual</b>
Extremely Low-income	232	0
Low-income	27	0
Moderate-income	6	0
<b>Total</b>	<b>265</b>	<b>0</b>

**Table 7 – Number of Households Served**

**Narrative Information**

As noted, the Town is responding to a number of 40B proposals. It is anticipated that, if approved, these projects will add nearly 1,000 new units of housing over the next several years with 15 – 25 percent of these being affordable to households earning less than 80 percent of area median income. The total number of affordable units in the pipeline could significantly surpass the projections in the Five Year Consolidated Plan.

## **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**

Midway through FY17, the City of Newton, lead agent of the former Brookline-Newton-Waltham-Watertown Continuum of Care (BNWW CoC), the MA Balance of State (BoS) CoC and the U.S Department of Housing and Urban Development, executed an agreement approving the BNWW CoC's merger with the BoS. The merger provided an opportunity to capitalize on existing administrative resources. Subsequently, former BNWW CoC agencies integrated within the BoS Coordinated Entry System. Efforts were undertaken to ensure integration by April 1, 2017, including coordination of training held at Newton City Hall on March 16, 2017 with CoC agencies to discuss the BoS CE process, Vulnerability Assessment tool and referral requirements.

The BoS-Coordinated Entry System provides a mechanism for housing the most vulnerable persons first, effectively focusing resources on those with the greatest need. Each provider within the CoC is able to conduct a comprehensive assessment of an individual, make the appropriate referral(s) to efficiently connect them with safe housing and/or the appropriate services, design individualized strategies accordingly and better understand homelessness in the Continuum and across the Commonwealth.

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

In FY17, the CoC utilized ESG funds for various shelter services, including those for survivors of domestic violence, and men's and women's overnight shelters. Pine Street Inn runs several projects within the CoC and has an experienced outreach team that engages those choosing not to utilize a shelter and provides the individuals with referral information, food, clothing, hygiene products, blankets, etc.

The need for emergency assistance remains present in the CoC. An additional 327 individuals were counted in the BNWW region during the 2017 Point-in-Time (PIT) Census, with 293 individuals housed in DHCD-funded Emergency Assistance (EA) motel overflow beds. The continuum found no unsheltered homeless persons on the night of the count in Brookline. Although there is a clear need and benefit of providing the shelter services, the BoS continues to support programs that create housing stability and economic mobility as a means to end the need for shelters.

- Brookline Community Mental Health Center operates a rolling stock Transitional Housing (TH) program in partnership with the Brookline Housing Authority. There are 17 set aside units for homeless people.
- Brookline Community Mental Health Center operates a TH program for 4 unaccompanied homeless young adults.
- Brookline Community Mental Health Center operates an Emergency Solutions Grant (ESG) rapid Rehousing (RRH) program funded through the Commonwealth's ESG disbursement. The agency serves about two people at any given time.

**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**

Following the merger of the BNWW CoC with the BoS CoC, efforts were quickly undertaken to ensure integration into the BoS Coordinated Entry System. Comprised of over 80 communities, the BoS provided the BNWW CoC with access to the many agencies already established within the BoS. The merger effectively maximizes and expands existing regional resources to better connect at-risk individuals and families with information, referrals and assistance.

The Continuum continued to strengthen engagement of participating stakeholders, as well as reaching out to new partners who would advance the promotion of housing stability, particularly among low-income veterans and their families who are homeless or at risk of homelessness. At the local level, the Brookline Community Mental Health Center provided case management, referral and financial assistance to over twenty households, of which fifteen were families. BCMHC has also developed individualized service plans and transition plans for young men ages 16 to 22 in the Transition to Independent Living Program. Youth are routinely discharged to reunify with their families or to another housing option if the youth's age permits or if reunification is not possible.

**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**

Brookline worked to implement its Housing Production Plan (HPP) to exceed the Chapter 40B 10 percent goal of affordable housing stock. In FY 2017, Town staff worked with the Selectmen-appointed Kent Street/Station Street Committee. The Committee is looking at the feasibility of reusing a Town-owned parking lot for affordable senior housing. The Committee met four times over the winter, spring and summer to discuss the reuse of the site and planning is ongoing into FY 2018.

Strategies to retain and possibly increase lodging house stock in Brookline (often SROs), occupied by very low-income persons will continue to be explored through partnerships with Pine Street Inn, Caritas, and Communities to End Homelessness. As with the Pine Street Inn's Beals Street project, the Town's goal is to purchase and renovate lodging houses in the pursuit of creating permanently affordable housing.

Collaboration continued with McKinney-Vento local educational authorities and school districts during FY17. The Brookline Community Mental Health Center contacts each school district homeless liaison at least once a week to discuss families or youth that may be at risk of homelessness and need prevention intervention.

To assure that homeless veterans have better access to services and housing to , the New England Center for Homeless Veterans has assigned its Housing Stabilization Operations Coordinator to the BNWW region. The coordinator works with local providers to identify the few homeless veterans in the BNWW region to ensure they are connected to VA services.

- HEARTH operates the Ruth Cowin House Permanent Housing (PH) Program which has 8 units for formerly homeless elders.
- Pine Street Inn operates a PH at 1754 Beacon Street for 13 formerly homeless persons.
- Pine Street Inn operates a PH at 51-57 Beals Street for 30 formerly homeless persons.
- Pine Street Inn operates the Brookline Rental Assistance for the Chronically Homeless PH in partnership with the Brookline Housing Authority. The project is designed to serve 4 persons.
- Pine Street Inn operates Jenks House PH at 1043-1045 Beacon Street for 24 formerly homeless persons.
- Pine Street Inn operates the Sarah Wallace House PH at 1017 Beacon Street for 16 formerly homeless persons.
- VinFen operates the Brookline Supported Housing Leasing PH for 2 formerly homeless persons.

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

### **Actions taken to address the needs of public housing**

The Brookline Housing Authority (BHA) plays a key role in providing affordable housing in the Town of Brookline. It provides the largest number of affordable apartments of any property owner in the Town. It is the mission of the Brookline Housing Authority to provide low-income families, seniors, and people of all abilities with safe, decent, accessible, and affordable places to live in a community rich with opportunities. The BHA works in collaboration with government and civic organizations to support and encourage the well-being and economic self-sufficiency of BHA residents; to sustain a diverse population in Brookline; and to maintain attractive residential neighborhoods. This mission statement was updated in 2015 to reflect a completed long-range Strategic Plan. The BHA was able in FY 2017 to complete the following capital improvements:

- Exterior masonry repairs at Trustman Apts. (DHCD funding)
- Replacement of Drains at High Street Veterans and Egmont Street Veterans (DHCD funding)
- Upgraded security cameras at the O'Shea, Sussman and Kickham developments; (CDBG funding)
- Roof replacement at Morse Apartments (HUD CFP funding)

The BHA is always looking at ways or the means to undertake resident services that will strengthen the lives of its residents. In FY 2017, the BHA undertook the following initiatives to continue their investment in the residents of their properties:

- Collaborated with Brookline Public Library for outreach and orientation of ESOL volunteers
- Provided free English classes at several family and senior properties, with support from CDBG and other funders
- Citizenship program in collaboration with Project Citizenship;

In collaboration with the Allston Brighton Community Financial Management program, the BHA launched a tax preparation and counseling service at its properties and prepared the returns of residents;

- Springwell and the BHA operated a multi-year state grant from the Supportive Housing Program to fund expanded service coordination for residents at all seniors' buildings as well as a daily hot lunch at the Morse Apartments (90 Longwood Avenue);
- Partnered with the Brookline Food Pantry to open a new food distribution site at the Egmont Street Veterans development;
- In collaboration with the Greater Boston Food Bank (GBFB), the BHA began distribution of food to its senior citizens under the GBFB's Commodity Food Distribution Program;
- Worked with the Brookline Parent Child Home Program (PCHP) , so that PCHP could start a playgroup for pre-school children in their 22 High Street property; and
- Operated a multi-year federal grant for resident self-sufficiency programming at the 22 High Street development under the Resident Opportunity and Self-Sufficiency (ROSS) program.

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

Within the BHA, there is the Town-Wide Resident Association, an elected body, with representatives from each of the BHA public housing developments. The president held various meetings in 2016 and 2017 to foster resident participation. At the BHA Board of Commissioners meetings, the TWTA president and/or other association officers represent the views of the resident population as a whole. The Resident Association was established in the 1960's to support positive change within the Housing Authority. This association has supported the BHA's efforts to create and maintain the highest quality of housing for the residents it serves, as well as strengthen social service programming and self-sufficiency opportunities. The association is the vehicle through which the BHA can efficiently communicate with residents with respect to important initiatives, policies and practices; and allows residents to challenge the BHA with independent ideas and concerns. Under the Open Meeting Law, all residents are welcome to attend a variety of BHA meetings to remain informed and share individual viewpoints. In 2017 the Egmont Street Veterans Housing Development resident association was revitalized with new leadership and active resident community members. This chapter has become an active participant in many town-wide community and social service program initiatives, along with the BHA, the Town and other community partners.

When homeownership opportunities have been promoted, the Town's Planning Department alerts the BHA about this, and the BHA publicizes these opportunities to the residents. The Steps to Success programs and the Next Step program offer BHA residents the ability to strengthen their careers and increase their incomes, which can lead to homeownership.

## **Actions taken to provide assistance to troubled PHAs**

The Brookline Housing Authority has not been designated a "troubled PHA". As such, no actions are required to assist it in that realm.

## **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)**

Brookline continues to provide affordable units as part of market-rate projects as required in section 4.08 of its Zoning By-Law through inclusionary zoning. These projects require an affordable housing benefit from all developments of six or more units. While 15 percent of developments of 16 or more units must be affordable, developers of 6 to 15 units may choose to make a contribution to the Brookline Housing Trust in lieu of such units. Three projects were approved under the Town's Inclusionary Zoning By-law that, due to the size of the projects, will provide funding for the Town's Affordable Housing Trust Fund in lieu of units. As in any affordable housing project, the Town will continue to work with the developers of all four projects to ensure that units are affirmatively marketed to income-eligible households.

The Town continues to use Zoning By-law provisions to work with developers proposing new projects to maximize affordable housing outcomes. The parking provisions of the Zoning-By-law allow for reduced parking requirements for affordable units. The Public Benefits Incentives within the By-law allow a limited density bonus for developers who are providing affordable units in excess of what is required.

The impact of high taxes on the cost of owning property in Brookline continued to be partially mitigated, for owner occupants through a residential exemption. The residential exemption is a dollar amount of value that is exempt from taxation. For example, in FY2017, a qualified homeowner eligible for a residential exemption will have \$229,655 deducted from the property's assessed value for purposes of calculating the tax bill. Furthermore, where affordable housing is deed restricted, the property will be assessed at the permitted resale price, further reducing taxes. The Town continues to work with affordable condominium buyers to take advantage of these tax savings when seeking financing. In addition, the Town will continue to subscribe to several State-authorized measures to provide tax relief for homeowners who are low-income, seniors, surviving spouses and children, veterans, and/or blind.

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

Housing Division staff continued to work with other Town departments, public and private affordable developers, and local private agencies to both assess housing needs and to serve those who need housing services.

During the fiscal year, staff maintained their support for working with developers to meet the needs of the underserved. With Town assistance, Jewish Community Housing for the Elderly (JCHE), a mission based housing developer, was able to move from predevelopment for a 100 percent affordable senior housing project through permitting at the Brookline Zoning Board of Appeals for a Ch 40B Comprehensive permit. JCHE received its comprehensive permit in March, 2017. Similarly, the Town collaborated with Pine Street Inn on its 53-57 Beals Street project, creating 31 "enhanced" SRO units serving single individuals earning less than 30 percent of area median income(AMI). Housing and

Community Development staff also worked with the Brookline Housing Authority to assure the preservation of its housing stock through the provision of CDBG and HOME funds for capital improvements, and to access project-based subsidies for projects under development.

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

The Town continued to reduce the risks of lead-based paint poisoning both for publically funded properties, as well as in private housing. Whenever a tenant filed a complaint or if any inspection was required by the State Sanitary Code and the unit is occupied children under the age of six years, Brookline's health inspector performed a lead determination. The Health and Building Departments also ensure that contractors followed the EPA Renovation, Repair, and Painting Rule (RRP Rule) entailing safe work practices when working in residential properties built before 1978.

According to the Massachusetts Department of Public Health Childhood Lead Poisoning Prevention Program, 1,427 Brookline children under the age of six were screened for lead poisoning during the period of 1/1/16 to 12/31/16. Of that number, two were confirmed to have elevated lead poisoning levels over the 10 micrograms per deciliter limit established by the State Lead law. This is significant given that 88 percent of the Town's housing stock was built before 1978.

The Town continued to require lead paint abatement as party of renovation programs for affordable housing undertaken by private non-profit developers using public funds. The substantial rehabilitation of 51-57 Beals Street required lead paint abatement due to funding received from HOME, CDBG, and federal Low Income Housing Tax Credits. Construction was fully completed in FY 2017, and included lead abatement of both multi-family properties.

The Housing Division continued to act as the authorized processing agency for the MassHousing "Get the Lead Out", a low cost loan program for lead removal. The program provides zero to two percent financing to owners of buildings with one to four units. This includes owner occupants whose incomes fall under certain low- and upper-moderate income limits and investor/non-profit owners who serve income-eligible tenants. The Town does an initial eligibility determination, assists the borrower in completing the loan package, and then assists the borrower in the lead abatement process required under Massachusetts State Law. However, while the Division receives inquiries (2 inquiries in FY17), the usefulness of this program in the town is limited due to the high proportion of condominium and rental units that are in relatively large buildings where access to common area testing and abatement may be more complicated. Some have even found the program daunting due to elements involved in the process. In addition, as housing costs continue to go up, many households do not meet the income eligibility standards set for this program.

Collaboration will continue between the Planning and Community Development Department, the Health and Building Departments to disseminate information and resources available to at-risk populations and key stakeholders.

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

One of the most challenging issues facing households living below the poverty line in Brookline is the high cost of rental housing. Brookline continues to work to provide housing opportunities for very low-income households earning less than 30 percent of area median income. As in prior years, the Town used CDBG funding to support capital improvements at properties owned by the Brookline Housing Authority (BHA).

The Town supports a number of programs through the CDBG program, particularly public services aimed at benefitting low-income households. These programs include, but not limited to, the Next Steps Program, the Brookline Learning Project, the Parent Child Home Program, and the Brookline Community Mental Health Center. These programs and agencies have created programs needed to meet the ever-growing need of very-low income households to help them address quality of life issues.

The Brookline Commission for Women, a non-profit, holds a winter clothing drive for Dress For Success and offers services and supplies to underprivileged women entering the workforce. They work with the Jennifer A. Lynch Committee Against Domestic Violence to sponsor the Making Cent\$ of money series of money management seminars for women.

The Town's Steps to Success (STS) program, with a mission to end generational poverty, one student at a time, assisted low-income public school students with year-round academic support and summer training experiences. The BHA, in conjunction with STS, sought to engage residents of the Town who experience language barriers by providing ESOL classes. The program engaged partner agencies as a core aspect of its mission for a comprehensive, community-based approach to adult learning in Brookline.

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

Housing and Community Development staff continued to collaborate with a number of Town departments, including the Health Department, which enforces health and sanitary codes and provides oversight in the area of lead paint and asbestos issues, as well as permitting for lodging houses. Staff works with the Council on Aging to explore housing models for meeting the needs of Brookline's aging population. Collaboration continues with the Brookline Community Mental Health Center, a stakeholder in the former Brookline-Newton-Waltham-Watertown (BNWW) Continuum of Care (C of C) before the move to balance-of-state. As a recipient of Emergency Solutions Grant (ESG) funding, BCMHC provides services to the four former Continuum of Care communities with homeless prevention programs. Lastly, Housing staff continued engagement with the Town's Veteran's office and School Department personnel, in promoting new affordable housing opportunities.

Housing and Community Development Staff continue to collaborate and liaise with the former BNWW C of C communities in order to inform policies and strategies to ensure homeless individuals and families receive needed services and move into permanent supportive housing.

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

The Brookline Community Mental Health Center and the Town's Diversity, Inclusion and Community Relations Department provide on-going case management to households that are homeless or at risk of being homeless, and links them to specific needed resources such as the Brookline Safety Net (providing short term emergency cash assistance which is available from the Brookline Community Foundation), and/or government entitlement programs such as fuel assistance, Section 8, public housing, SNAP benefits, and MassHealth. All mainstream resources are sought by public, private housing, and social services agencies since they continue to collaborate to help meet the needs of vulnerable populations.

With a limited pool of ever-shrinking resources available to these and other agencies, the most efficient way to meet the on-going needs of different populations is to foster collaboration among public, private, and social service agencies. Subrecipients of the grant are encouraged to share their respective expertise to benefit their peers, and there is an ongoing history of regular meetings among Town agencies to discuss collaboration and coordination of resources.

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

With Town Meeting approval, The Office of Diversity, Inclusion and Community Relations (ODICR) in conjunction with the Commission for Diversity, Inclusion and Community Relations (CDICR) revised its governing by-law in November 2016, including its complaint procedure.

An on-line complaint form includes the capacity to field complaints for fair housing. The complaint process is universal in that its intention is to offer an avenue for recourse to individuals who claim to be subjected to discriminatory practices, including housing discrimination. Major changes to the complaint process and procedure include: 1) Actions taken and other useful measures can be recorded within a database; 2) Data can more easily be quantified and summed; 3) Data can be analyzed for trends and intervention efficacy; 4) Complaint form is more user friendly; and 5) System provides the capacity for oversight while limiting access to a complainant's private information.

Changes to the governing by-law address fair housing in order make it consistent with the by-laws that govern the CDICR. The by-law amendments will restructure how the CDICR and the ODICR proceed to manage fair housing cases, and do not broaden or restrict Fair Housing Laws or regulations.

The need for increased supportive housing for persons with mental and physical disabilities continues. Housing opportunities for persons living on SSI and SSDI are very limited. To address this impediment, the Town continued to seek opportunities to work with service-orientated non-profits to create new opportunities to provide housing with both supportive-services as well as wheel-chair accessible living space. Two of the units that Pine Street Inn rehabilitated as part of the Beals Street project serve extremely low-income households and are wheelchair accessible in order to serve adults with disabilities.

## **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**

**HOME:** The Town's HOME-funded projects in Brookline have fewer than 25 units an on-site inspection is required every two years. Housing staff completed three Housing Quality Standards (HQS) inspections in FY 2017. Tenant re-certifications are done on an annual basis, and took place in fiscal year 2017 as well.

Additionally, all homeowners who have received financial assistance through the Homebuyer Assistance program (or have deed restrictions under the Town-sponsored programs) are monitored on an annual basis to verify continued owner occupancy. The Brookline Homebuyer programs require that all units purchased with HOME funds remain buyer-occupied throughout the term of the mortgage. Each buyer is contacted by certified mail with a return receipt request. The owner must sign and return an enclosed certification that s/he still occupies the unit as his/her primary residence and that s/he is in compliance with all terms, conditions, and requirements set forth in the mortgage and promissory note.

Owner occupancy is also confirmed through an Assessor's Office determination that the owner continues to qualify for the Town's residential exemption, and through review of annual Town-generated street listings. If an unit is found to be out of compliance, Housing Division staff will work with Town Counsel to initiate foreclosure and recapture the unit. All current participants continue to comply with the requirements under the program regulations.

**CDBG:** The Town monitors recipients within the first quarter of the program fiscal year. If risk analyses dictate the on-going program review is necessary, ongoing monitoring is undertaken. After an initial round of monitoring in the fall of 2016, there were no programs deemed to be at risk and no remediation plans were implemented.

Initial program monitors help staff to evaluate programs and to identify issues to determine if technical assistance is needed. These initial meeting help expedite monitoring when it occurs later in the fiscal year, particularly with public service subrecipients, who are required to submit income eligibility documentation for review prior to the first invoice.

Subrecipients whose projects involve Davis-Bacon labor standards are sent -- prior to the execution of their contract -- a communication stating their requirement to administer and enforce federal labor provisions. The latest edition of "Making Davis-Bacon Work-A Contractor's Guide to Prevailing Wage Requirements for Federally Assisted Construction Projects-2012" (prepared by HUD) is sent to recipients in electronic copy. Staff meet and discuss/clarify these requirements with project managers as needed.

**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.**

Program regulations mandate citizen participation throughout the fiscal year as well as notification on specific documents or actions. A legal ad was placed in the September 7, 2017 edition of the Brookline TAB to inform members of the Brookline community of the opportunity to comment on the FY 2017 Consolidated Annual Performance and Evaluation Plan (CAPER). The TAB is available for free in print and online to all residents of the Town. Beginning September 8 to September 23, 2017, the term of the 15 day comment period for this report, no comments were received. This document was available in Brookline Town Hall at the Planning and Community Development Office and on the Town's web site for review.

**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.**

During the course of FFY 2016 (FY 2017) there was no necessity to change program objectives slated the Town's latest Five Year Plan (2016-2020) and/or Annual Action Plan for FY2016.  
Not applicable.

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

No

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



Office of Community Planning and Development  
 U.S. Department of Housing and Urban Development  
 Integrated Disbursement and Information System  
 PR26 - CDBG Financial Summary Report  
 Program Year 2016  
 BROOKLINE , MA

DATE: 09-21-17  
 TIME: 15:35  
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PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	1,379,698.64
02 ENTITLEMENT GRANT	1,345,269.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	156,793.73
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	2,881,761.37

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	1,057,787.76
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	1,057,787.76
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	227,539.08
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	1,285,326.84
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,596,434.53

PART III: LOWMOD BENEFIT THIS REPORTING PERIOD

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	692,377.15
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	365,410.61
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	1,057,787.76
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: PY: PY:
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	0.00
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	186,625.19
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	186,625.19
32 ENTITLEMENT GRANT	1,345,269.00
33 PRIOR YEAR PROGRAM INCOME	39,261.30
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	1,384,530.30
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	13.48%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	227,539.08
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	227,539.08
42 ENTITLEMENT GRANT	1,345,269.00
43 CURRENT YEAR PROGRAM INCOME	156,793.73
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	1,502,062.73
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	15.15%



