

The City of Worcester
Executive Office of Economic Development



**CONSOLIDATED ANNUAL PERFORMANCE &
EVALUATION REPORT (CAPER)**



REPORTING ON THE FIFTH YEAR
(2024 - 2025)
OF THE 2020 – 2025 CONSOLIDATED PLAN



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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)

During the July 1, 2024 to June 30, 2025 CAPER period, the City of Worcester continued to make progress toward the community development goals outlined in its 5-Year Consolidated Plan. To support low- and moderate-income (LMI) residents experiencing homelessness, housing insecurity, or living with HIV/AIDS, the Executive Office of Economic Development (EOED) implemented nine Emergency Solutions Grants (ESG) contracts with eight local project sponsors, totaling over \$428,000. Additionally, the Housing Opportunities for Persons with AIDS (HOPWA) program provided four contracts with three agencies totaling more than \$769,000 for rental assistance and supportive services across the Worcester Eligible Metropolitan Statistical Area. The HOME-funded Tenant-Based Rental Assistance (TBRA) program helped 30 homeless single adults secure stable housing with access to support services.

Although no Community Development Block Grant (CDBG) funds were used for building demolitions this year, planning was completed for the demolition of three blighted structures. The Systematic Housing Inspections Program ("Sweeps" program) run in conjunction with DIS utilized \$68,935.00 in CDBG funds to inspect 811 units of housing primarily located in the South Worcester Neighborhood. Of the total units inspected 95 units were found to have code violations and rehabilitation programs were advertised to owners who were eligible to receive grant funding to remedy them. The first-time homebuyer downpayment assistance program utilized \$10,000.00 to assist two households with the purchase of their first home. In addition, CDBG funds have financed 15 Elder and Owner-Occupied rehabilitations (\$519,384.00), 4 Investor-Owner projects (\$311,250.00), and 3 lead paint abatement and rehabilitation projects through the Worcester Lead Abatement Program (WLAP) and Healthy Homes Match (\$25,275.00).

Regarding public service activities, a total of 4,916 low- and moderate-income (LMI) persons were assisted through 19 CDBG funded programs that expended \$672,072 during the fifth-year action plan period. These funds leveraged roughly \$2,531,614 in additional public and private funds. During the last 5 action plan years (beginning 07/01/2020) roughly 29,545 LMI person have benefitted from 88 public service programs in which \$4,012,914 in CDBG funds were expended.

Over the past five action plan years, a total of \$7,952,543 in CDBG funds has been allocated across 20 public facilities projects. These include the reconstruction of four streets, rehabilitation of 8 nonprofit facilities, two senior center improvements, and two public school facilities, the purchase of two firefighting trucks, one historic building preservation project, and one accessibility project for the Worcester Housing Authority. To date, \$3,836,433.63 has been expended on these projects.

Worcester also remained focused on revitalizing the Green Island Neighborhood, The city finalized construction documents for comprehensive street improvements along Endicott and Bigelow Streets and hosted a final community meeting in January 2024. Construction is set to begin in October 2025, using approximately \$2.42 million in CDBG funding and leveraging \$1.88 million in city capital. Planned upgrades include wider sidewalks, bike lanes, improved stormwater drainage, and increased tree cover

to enhance both infrastructure and livability.

Finally, CDBG funds help to incentivize business creation, expansion, and enhancement through loans, grants, and technical assistance. In the past five years, the City has expended \$940,674 in CDBG to assist 34 businesses/properties that have generated 46 jobs for low- and moderate-income persons. This CDBG funded business assistance activity has generated \$9,784,986 in other investments.

Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)

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

(table follows this page)

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 Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Rental units constructed	Household Housing Unit	75	63	84.00%	11	11	100.00%
Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Rental units rehabilitated	Household Housing Unit	90	106	117.78%	21	21	100.00%
Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Added	Household Housing Unit	75	4	5.33%			
Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	125	38	30.40%	22	22	100.00%
Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Direct Financial Assistance to Homebuyers	Households Assisted	50	6	12.00%			
Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	100	134	134.00%	30	30	100.00%

Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Housing for Homeless added	Household Housing Unit	50	6	12.00%	0	0	
Affordable Housing Development & Preservation	Affordable Housing	CDBG: \$ / HOME: \$	Housing for People with HIV/AIDS added	Household Housing Unit	50	32	64.00%	0	0	
Economic Development & Business Assistance	Non-Housing Community Development	CDBG: \$	Facade treatment/business building rehabilitation	Business	50	6	12.00%	3	0	0.00%
Economic Development & Business Assistance	Non-Housing Community Development	CDBG: \$	Jobs created/retained	Jobs	50	47	94.00%	15	7	46.67%
Economic Development & Business Assistance	Non-Housing Community Development	CDBG: \$	Businesses assisted	Businesses Assisted	50	34	68.00%	8	2	25.00%
Expanded Resources for Homeless Prevention	Homeless	ESG: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	330	100	30.30%	188	60	31.91%
Expanded Resources for Homeless Prevention	Homeless	ESG: \$	Homeless Person Overnight Shelter	Persons Assisted	3345	4311	128.88%	1524	1365	89.57%

Expanded Resources for Homeless Prevention	Homeless	ESG: \$	Homelessness Prevention	Persons Assisted	25	232	928.00%			
Healthy and Sustainable Housing	Non-Housing Community Development	CDBG: \$	Buildings Demolished	Buildings	15	5	33.33%	2	2	100.00%
Healthy and Sustainable Housing	Non-Housing Community Development	CDBG: \$	Housing Code Enforcement/Foreclosed Property Care	Household Housing Unit	4235	3036	71.69%	847	847	100.00%
Housing Opportunities for Persons with HIV/AIDS	Homeless Non-Homeless Special Needs	HOPWA: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	28410	22678	79.82%			
Housing Opportunities for Persons with HIV/AIDS	Homeless Non-Homeless Special Needs	HOPWA: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	125	62	49.60%	39	0	0.00%
Housing Opportunities for Persons with HIV/AIDS	Homeless Non-Homeless Special Needs	HOPWA: \$	Homelessness Prevention	Persons Assisted	350	181	51.71%	215	15	6.98%
Housing Opportunities for Persons with HIV/AIDS	Homeless Non-Homeless Special Needs	HOPWA: \$	Jobs created/retained	Jobs	0	0				
Housing Opportunities for Persons with HIV/AIDS	Homeless Non-Homeless Special Needs	HOPWA: \$	Housing for People with HIV/AIDS added	Household Housing Unit	50	32	64.00%	2	0	0.00%

Housing Opportunities for Persons with HIV/AIDS	Homeless Non-Homeless Special Needs	HOPWA: \$	HIV/AIDS Housing Operations	Household Housing Unit	550	258	46.91%	100	0	0.00%
Improvements and Preservation of Public Facilities	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	98325	123750	125.86%	3500	771	22.03%
Improvements and Preservation of Public Facilities	Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	28410	22678	79.82%			
Neighborhood Stabilization & Revitalization	Non-Housing Community Development	CDBG: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1953	4210	215.57%	9075	0	0.00%
Public Services for Low-Moderate Income Persons	Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	28410	27616	97.21%	4474	4938	110.37%

Public Services for Low-Moderate Income Persons	Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Homeless Person Overnight Shelter	Persons Assisted	3345	1829	54.68%	0	5	
Public Services for Low-Moderate Income Persons	Non-Homeless Special Needs Non-Housing Community Development	CDBG: \$	Homelessness Prevention	Persons Assisted	25	30	120.00%			
Resolve Barriers to Housing for Homeless Persons	Homeless	ESG: \$	Homeless Person Overnight Shelter	Persons Assisted	3345	1824	54.53%			
Resolve Barriers to Housing for Homeless Persons	Homeless	ESG: \$	Homelessness Prevention	Persons Assisted	25	30	120.00%	255	357	140.00%
Resolve Barriers to Housing for Homeless Persons	Homeless	ESG: \$	Other	Other	500	525	105.00%	1867	0	0.00%

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.

The process for developing the fifth year (2024–2025) Annual Action Plan followed the same structure outlined in the City's Five-Year Consolidated Plan. Community engagement and funding recommendations were centered around the Community Development Advisory Committee (CDAC), a formal body of citizens that provides input on applications submitted through the City's Community Development Block Grant (CDBG) Request for Proposals (RFP) process. CDAC is comprised of ten members, with two representatives from each of Worcester's five council districts.

For the fifth year, CDAC met remotely between February and March 2024 to evaluate, review, and rate proposals submitted in response to the CDBG RFP issued on December 1, 2023, with applications due by January 10, 2024. The proposals reviewed included Public Services, Public Facilities and Improvements, and interdepartmental submissions from City departments. CDAC issued initial funding recommendations, which were then reviewed by City Administration. The final funding decisions were informed by both CDAC's input and the City Manager's priorities, ensuring that the selection process reflected both community input and the goals outlined in the 2020–2025 Consolidated Plan.

The HOPWA Advisory Committee followed a parallel review process for the Housing Opportunities for Persons With AIDS (HOPWA) program. The committee includes subject matter experts in community health and HIV/AIDS services across Worcester County and Connecticut. The committee hosted a remote public meeting to present the HOPWA process and guidelines, a technical assistance session for potential applicants, and a public proposal review and ranking session at City Hall. Final recommendations were submitted to City Administration for approval.

Similarly, Emergency Solutions Grant (ESG) proposals were evaluated by the ESG RFP Review Committee, which includes members from the Worcester City and County Continuum of Care (CoC). The committee conducted a remote public meeting to outline ESG guidelines, held a technical assistance session for applicants, and facilitated a review and ranking session at City Hall. Recommendations were forwarded to City Administration for final approval.

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	HOME	ESG	HOPWA
Race:				
White	1951	70	887	N/A
Black or African American	1429	25	263	N/A
Asian	620	0	10	N/A
American Indian or American Native	24	0	9	N/A
Native Hawaiian or Other Pacific Islander	7	0	3	N/A
Total	4031	95	1172	N/A
Ethnicity:				
Hispanic	1480	18	207	N/A
Not Hispanic	2551	77	1590	N/A

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

Narrative

Above reports from IDIS PR-23 accomplishment reports. Please see the attached HOPWA CAPER and ESG SAGE CAPER 2023-24 analysis for racial and ethnic populations assisted with HOPWA and ESG.

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	6,829,615.00	2,963,576.00
HOME	public - federal	3,701,765.00	1,195,795.00
HOPWA	public - federal	973,330.00	998,348.28
ESG	public - federal	655,630.00	274,135.00

Table 2 - Resources Made Available

Narrative

The Five-Year Consolidated Plan (2020-2025) projected level CDBG funding over the five-year period, estimating approximately \$4,617,183.00 available for year five. For year five, Worcester received \$4,261,392.00 in CDBG funding, which represents a 4.52% increase from year four and is 7.71% less than the amount estimated in the Consolidated Plan. During the year, the City expended a total of \$2,835,636.86 in CDBG funds. Additionally, \$1,566,653.28 was allocated from HOME funds, while \$793,198.00 and \$358,347.00 were allocated to HOPWA and ESG programs, respectively. See attached reports for more detailed breakdowns of disbursements for these sources.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Green Island Revitalization Initiative	3	3	Census Tract 7325.00
Low-Moderate Income Census Tracts	97	98	Census Tracts > 51.0% LMI

Table 3 – Identify the geographic distribution and location of investments

Narrative

The City of Worcester continues to focus its efforts on strategic neighborhood revitalization, directing approximately 97% of non-administrative CDBG funds toward programs and projects serving Low- and Moderate-Income (LMI) individuals and the city's most underserved census tracts. The City is comprised of 44 U.S. Census tracts, of which 26 maintain 51.0% or more of their populations classified as LMI—defined by HUD as households earning 80% or less of the metropolitan area median income, adjusted for family size.

Census Tract 7325.00 (the Green Island neighborhood) remains one of the city's most distressed areas, characterized by high poverty and crime rates, foreclosed properties, absentee ownership, vacant and boarded-up buildings, and other indicators of economic distress. This tract continues to be a priority for

CDBG investment as the City advances its infrastructure and neighborhood improvement initiatives.

This year, no demolition of blighted buildings occurred; however, sites have been identified by Inspectional Services and are in the pipeline for future demolition activities.

Approximately 3% of this year's funds were allocated to Green Island, supporting a food pantry project and covering the remaining design and engineering costs for the Complete Streets project. The Green Island Complete Streets project has reached 100% design completion and is scheduled to begin construction in the fall, following the close of the bid process in September.

The City remains committed to continued neighborhood improvements and public facility enhancements within the most underserved census tracts.

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.

3 Public Facilities projects concluded this year for the ACE Gymnasium HVAC, Friendly House exterior ADA improvements, and flooring rehabilitation for the Boys & Girls Club Locker room totaling \$352,933.42 in CDBG funds. \$89,997.00 in private funding was leveraged towards completion of these projects. Additionally, 4 public facilities projects commenced this year totaling \$2,248,760.00 in CDBG funds, towards which \$603,000 in City capital and \$42,700 in private funds has been leveraged.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	\$3,032,621
2. Match contributed during current Federal fiscal year	\$0.00
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	\$3,032,621
4. Match liability for current Federal fiscal year	\$298,948.75
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	\$2,733,672.25

Table 4 – Fiscal Year Summary - HOME Match Report

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match

Table 5 – Match Contribution for the Federal Fiscal Year

HOME MBE/WBE report

Program Income – Enter the program amounts for the reporting period				
Balance on hand at begin- ning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
0	\$203,388.85	\$203,388.85	\$135,857.00	0

Table 6 – Program Income

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period						
	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Contracts						
Dollar Amount	0	0	0	0	0	0
Number	0	0	0	0	0	0
Sub-Contracts						
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0
	Total	Women Business Enterprises	Male			
Contracts						
Dollar Amount	0	0	0			
Number	0	0	0			
Sub-Contracts						
Number	0	0	0			
Dollar Amount	0	0	0			

Table 7 - Minority Business and Women Business Enterprises

Minority Owners of Rental Property – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

Table 8 – Minority Owners of Rental Property

Relocation and Real Property Acquisition – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
Parcels Acquired		0		0		
Businesses Displaced		0		0		
Nonprofit Organizations Displaced		0		0		
Households Temporarily Relocated, not Displaced		0		0		
Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

Table 9 – Relocation and Real Property Acquisition

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	30	60
Number of Non-Homeless households to be provided affordable housing units	86	86
Number of Special-Needs households to be provided affordable housing units	128	59
Total	244	205

Table 10 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	188	149
Number of households supported through The Production of New Units	11	11
Number of households supported through Rehab of Existing Units	43	43
Number of households supported through Acquisition of Existing Units	2	2
Total	244	205

Table 11 – Number of Households Supported

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

In Table 12 above the Goal for Number of households supported through rental assistance was 30. During the year 60 households were supported through rental assistance, getting approximately to the goal. For the Number of households supported through the production of new units there was a goal of 11 units, of which there were 11 created. For the Number of households supported through the rehab of existing units there was a Goal of 43 units of which we almost achieved at 43 units rehabbed (22 Homeowner units and 21 Rental units). Overall this number is expected to fall in line with expectations

or will be adjusted in coming ConPlan years. For this year there was a goal of 2 households supported through the acquisition of existing units. During the year there was 2 household assisted through the acquisition of existing units. The programs were still impacted due to the tail end of the Pandemic. In addition a program for City employees was also offered through other funding sources.

Discuss how these outcomes will impact future annual action plans.

Outcomes achieved will be analyzed and used to adjust future annual action plans. These changes will be reflected in the next Consolidated Plan.

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

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	4	17
Low-income	4	15
Moderate-income	4	24
Total	12	56

Table 12 – Number of Households Served

Narrative Information

The beneficiary information provided above is from the PR-23 CDBG and PR-23 Home program.

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

Multiple agencies conduct outreach efforts in the City of Worcester. Collaborative efforts through the Worcester County Continuum of Care and the City's Emergency Solutions Grant (ESG) support Outreach Efforts and Case Management. These services connect the unsheltered homeless populations with Emergency Shelters, Supportive Services and Permanent Housing.

The city continues its strategies in reaching out to unsheltered homeless persons found living in places not meant for human habitation and assessing their individual needs. City ESG funds supported 62% of the salary costs for a Community Navigator/Recovery Coach to work in unison as part of the City of Worcester Quality of Life Task Force to conduct assessment of individual needs, enable access to mainstream resources, and connect housing referrals for 20 unduplicated unsheltered households with children, as well as 180 unduplicated unsheltered individuals. During the course of the contract year HHS connected with 358 individuals living in places not meant for human habitation, of the 358, 168 individuals engaged in the intake process to be referred to community based resources including shelter, housing, transportation, behavioral health care, medical care and mainstream resources with the Homeless Outreach Team. 70 individuals engaged with the Community Navigator/Recovery Coach to develop a housing placement plan to achieve or maintain ongoing stability of those assessed for housing and stabilization. 110 Individuals entered a substance abuse treatment facility and 59 individuals participated in the Jail Diversion through Recovery Court Program.,

Since 2019, the Housing Outreach Team has directly assisted 1,609 individuals and households experiencing homelessness. Over 4,690 interactions have been conducted, including intakes, follow up check-ins and exits once individuals have secured housing or connected with necessary services. Additionally, 1,115 individuals assessed detox services and 357 individuals were successfully connected with housing services.

Additional ESG Outreach offers homeless outreach services through Open Sky, Central Mass Housing Alliance (CMHA), South Middlesex Opportunity Council (SMOC), Veterans Inc. and Dismas House. These agencies offer a variety of services such as long-term assistance to unsheltered persons by frequenting locating and interaction in such areas as the downtown corridor of Union Station, the Public Library, parks and roadways prone to panhandling and loitering throughout the city. Dismas House works with those coming out of incarceration that would be left to the street without this program. Soup kitchens and food kitchens identify and engage with such individuals/families. The goal to engage with people over time and encourage those that typically refuse services is a continued practice, which over time will hopefully make it a safe environment for them to accept help through long-term engagement of the

street outreach workers as they focus on mental health assessments, treatment, advocacy and benefit assistance.

Addressing the emergency shelter and transitional housing needs of homeless persons

The City's one-year plan to address emergency shelter and transitional shelter needs for the homeless were encompassed in Strategic Plan Goal 8: Resolve Barriers to Housing for Homeless Persons, and Goal 9: Housing Opportunities for People Living with HIV/AIDS. These actions were supported by both ESG and HOPWA funds through the following activities.

ESG Shelter funds support shelter Case Management for Triage and Assessment services at 2 locations, the Queen Street Shelter is diversifying to men only, the women were moved to the MLK Building on Chandler Street. The 16 bed HERS program for women ended July 1, 2025, and the highly anticipated women's only shelter at the Chandler Street location opened August 6, 2025. The MLK Chandler Street location is the primary shelter for unaccompanied homeless women and the operations of transitional housing for victims fleeing domestic violence. A total, 1,311 unaccompanied adults experiencing homelessness benefitted from ESG emergency shelter funds through the Triage and Assessment Center, while 77 individuals fleeing from domestic violence benefitted from emergency shelter operations funds. Each of these activities helped address the shelter and transitional housing needs of homeless populations because of the crisis intervention nature of program support. They supported the operations and case management of facilities to ensure the safety and stability first, followed by reentry skills such as employment before the transition to permanent housing so that individual needs can be addressed towards greater housing outcomes. These programs recognize that permanent housing is the ultimate goal, but some populations that are particularly at risk may need enhanced stabilization and case management.

HOPWA funds supported the operations and supportive services associated with Transitional Housing needs, including the intensive case management costs for HIV positive women with or without children, and special needs population including those being discharged from institutions, or with severe mental health and substance abuse barriers. HOPWA Supportive Service agencies such as Making Opportunity Count expanded their program and are now serving at a new capacity of 12 Households. In the past year Aids Project Worcester Housing Services Program was able to provide services to 90 unduplicated HIV positive eligible individual.

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

In working towards Goal 7: Expand Resources for Homelessness Prevention, HOPWA dollars were used

to support 53 low income individuals with an HIV/AIDS diagnosis in avoiding homelessness through the provision of short term rent, utilities and mortgage (STRMU) assistance as well others were provided with Permanent Housing Placement (PHP) Support to stabilize in permanent housing through the payment of first and last month's rent, thus avoiding homelessness and stabilizing in permanent housing.

Through the case management services funded by the City's allocation of ESG funds, many of these prevention services were supported. The Commonwealth of Massachusetts does provide information for youth in foster care or leaving foster care. It coordinates with many service providers and provides resources and education on many subjects, such as your rights, services, education, health, and relationships. The Answer Book was written to help youth reach adulthood more prepared to live safely, successfully, and independently. However, often times, there are individuals that fall into homelessness or are in precarious situations and are at imminent risk of homelessness. Similarly, for those exiting the criminal justice system, many are at-risk of homelessness. Providers around the country are finding that rapid re-housing can be an effective intervention to help young people experiencing homelessness. These providers are using the same core components of rapid re-housing as adult rapid re-housing programs: housing identification, rent and move-in assistance, and case management and services, but tailoring each component according to where young people are in their life journeys.

To address the potential homelessness youth, in partnership with the Continuum of Care, and agencies such The Bridge of Central Massachusetts, South Middlesex Opportunity Council and LUK, Inc., resources targeting include but not limited to youth who are at risk of aging out of the foster care system without permanency or who have aged out. This collaboration continues to formalize working relationships between these organizations to provide comprehensive and outcomes-oriented services for youth and young adults who are or have been involved in the state systems who are facing barriers to stability as young adults.

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

The 28-member task force, set up by prior City Manager Edward Augustus, continues to meet quarterly to continue the ongoing examination of the community's needs and resources to address adult chronic homelessness. The Task Force's ultimate goal is to develop a plan for actions and resources to sustain a long-term system of permanent supportive housing in the city

The City's Plan continues to Address Homelessness strives to expand on the successful "housing first" model, which moves away from extensive and costly shelter stays, and to focus on homeless prevention to stabilize vulnerable individual adults, families, youth and young adults. The City's ultimate goal is to

quickly stabilize those in our community who are homeless so they can ultimately obtain safe and affordable permanent housing. The City recognizes the need to develop units for individuals and families through innovative strategies including rehabilitating existing housing stock along with furthering efforts to prevent homelessness and improve the delivery of comprehensive service strategies that address the health, employment, and long-term self-sufficiency skills targeted to specific populations struggling with homelessness and other special needs.

All HUD-funded programs include financial eligibility criteria and are targeted to very low-income and extremely low-income households. Local providers such as the Bridge of Central Massachusetts offer essential services to prevent homelessness and work closely with Individuals (include chronically homeless individuals) and families, families with children, unaccompanied youth ages 18 - 24 (with a particular emphasis on LGBTQIA+ youth), and individuals with dually diagnoses mental health and addiction challenges

ESG Rapid Rehousing funds provide short term and medium-term rental assistance as well as housing relocation and stabilization services. Rapid rehousing funds throughout the program year.

HOPWA funds focus on stabilization in the transition to permanent housing by providing supportive services to 190 individuals with an HIV/AIDS diagnosis in the Worcester Eligible Metropolitan Service Area. HOPWA programs for Tenant Based Housing Assistance and supportive services focused on the attainment of permanent housing through mobile vouchers. Additional permanent housing was facilitated through facility-based programs and Permanent Housing Placement rental startup assistance.

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

Actions taken to address the needs of public housing

The Worcester Housing Authority (WHA) owns and manages approximately 3,000 Public Housing (PH) units and administers roughly 4,300 housing vouchers in its federal Housing Choice Voucher and state MRVP programs.

In addition to major redevelopments (see below), the WHA invests millions of dollars annually in improvements at properties across its portfolio.

Modernization Facility Upgrades:

The WHA completed code and modernization facility upgrades totaling over \$8 million for its public housing portfolio. Projects included replacement of antiquated elevator, fire alarm, fire suppression systems, envelope systems including installation of energy efficient windows and many other unit upgrades across the city.

Self-Sufficiency:

Our A Better Life and Family Self-Sufficiency program provide comprehensive services to help our families reach their life goals. These programs offer intense case management to participants. ABL encourages, motivates, and requires participants to either complete their education, obtain a full-time job, or a full-time combination of both. FSS is a voluntary program that helps families increase their income through educational, employment, and financial services. When their rent increases as a result of an increase in income, the difference is saved in escrow and, when the program is completed, the money saved can be used toward a number of purposes, such as buying a house or private-market apartment. These programs follow the WHA's mission to enhance the Worcester community by creating and sustaining decent, safe, and affordable housing that champions stability and self-sufficiency for our residents.

Housing Opportunities

- **A Place to Live**

The WHA is proud to have partnered with the City of Worcester a number of local agencies, as well as the state, to introduce the first permanent, long-term solution for housing the chronically homeless in Worcester. A Place to Live at 38 Lewis Street opened in December 2024 and has since strived to provide residents a place to call home while obtaining the tools and skills necessary to chase their dreams. We work with the Continuum of Care on referrals. If there are none, we house the homeless based on our own lists. A full-time case manager works with each resident individually, while partnering with local organizations to provide a range of programming and services, such as hygiene and health care, financial independence, and recovery from addiction, to mention a few. This person advocates for our residents and champions their wellbeing. Each individual works off an Individual Service Plan, or ISP. A live-in manager provides supervision at night. We are proud of the efforts many of our residents have

put into improving their lives, taking advantage of programs run with community partners and established by the case manager.

- **New Beginnings**

The WHA provides housing opportunities for men in recovery through its New Beginnings program. New Beginnings is a sober living program designed for men who want to live and enjoy life in a drug and alcohol-free environment. Accountability is a common value that needs to be shared by all who participate in the program.

This is a zero-tolerance program, and all residents will be responsible for maintaining a clean and sober lifestyle. Applicants are referred to the WHA from a community partner specializing in substance abuse recovery. Acceptance into New Beginnings is contingent upon two simple conditions: a desire to live in a drug and alcohol-free setting and adherence to the program guidelines.

Major Redevelopment Projects

- **Curtis Revitalization Project**

Redevelopment of Curtis Apartments, built in the early 1950s, is well under way, with our development partner, Trinity Financial, Inc. Phase 1, consisting of two buildings, saw the demolition of 90 units and will result in 129 new apartments, with an estimated cost of \$96.5 million. Building A in Phase 1 will be ready for occupancy before the end of 2025.

Phase 2 of the Curtis Redevelopment is approved and ready to move forward, with demolition slated for early October. TDC for Phase 2 is \$142 million. This phase includes construction of the Economic Opportunity Center (EOC). The EOC will house the Family and Resident Services staff, Housing Managers Office, the GBV branch library, a community room for public meetings, an office for our Resident Council, classrooms, our Step-Up Apprenticeship Program, and a new computer lab.

This amazing facility will allow our residents to work toward their goals while receiving the proper assistance, all under one roof. In addition, the relocation of staff offices, currently scattered throughout GBV, allows for the conversion of the current offices into an estimated 30 new units, six of which will be wheelchair accessible.

- **Lakeside Apartments Project**

Similar to the redevelopment of Curtis Apartments, which were built in 1952, the WHA partnered with a developer, Boston Financial (formerly Tremont Development), to redevelop our oldest existing property Lakeside Apartments. Built over 70 years ago in 1948, Lakeside has become obsolete. This project will be done in four phases and will replace all existing 202 units of housing and add 130 new affordable units. The most unique and exciting aspect of this project is the development of 10 affordable home-ownership units. It is the WHA's hope that our own residents purchase those units with the assistance of our Family and Resident Services departments.

Enhanced Public Safety

Keeping its communities safe and crime free is the Worcester Housing Authority's first priority. To be successful, the WHA needs to rely on partnerships with the Worcester Police Department and its residents. To that end, the WHA meets with resident councils and holds routine Community Engagement sessions to discuss crime and crime prevention methods.

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

The Worcester Housing Authority (WHA) is dedicated to enhancing the lives of low-income individuals by providing not just safe and affordable housing, but also a range of services aimed at promoting self-sufficiency and improving quality of life. Here's a concise summary of their initiatives:

- **Affordable Housing and Self-Sufficiency:** WHA offers affordable housing while also focusing on self-sufficiency through employment, job training, and education. Programs like "Step Up" and Clerical Apprenticeships give residents opportunities for meaningful employment.
- **Educational Support:** The WHA emphasizes education with on-site GED and ESL classes, as well as computer and homework centers to support learning and personal growth.
- **Home Ownership Assistance:** The Family Self-Sufficiency (FSS) program helps families transition from renting to owning homes by providing resources for credit counseling, banking, and financial assistance for down payments and closing costs. FSS participants are helped with resources and referrals for credit counseling, banking information and their escrow accounts and may use these funds as a resource to help with down payments and/or closing costs or other expenses related to the purchase of a new home. The WHA has long realized that a portion of its success is dependent upon the satisfaction of its residents.
- **Resident Engagement:** WHA values resident feedback and fosters partnerships through tenant organizations and regular meetings with the Jurisdiction-wide Resident Council to discuss policy and program changes.
- **Tenant Organizations:** Continuing its efforts in fostering partnerships with them, the WHA has encouraged the formation and organization of tenant organizations. These recognized tenant organizations are the conduit through which ideas and issues are presented to the WHA administration and through which policy, operational and program changes and enhancements are presented to its residents. The Executive Director meets monthly with the WHA Jurisdiction wide Resident Council to discuss policy changes, program implementation, and other areas of the WHA operation that have a direct effect on the people it serves. The WHA recognizes and appreciates the knowledge, life experiences and ideas that it receives from its resident population.
- **Community Safety:** To ensure safety, WHA collaborates with the Worcester Police Department and maintains active Crime Watch groups, involving residents and various local agencies in

regular meetings.

- Future Goals: WHA remains committed to providing safe and affordable housing while continuously exploring innovative programs and opportunities to increase housing options for the community. This comprehensive approach underscores WHA's commitment to both immediate support and long-term success for its residents.

Actions taken to provide assistance to troubled PHAs

The Worcester Housing Authority (WHA) was not classified as a troubled Public Housing Authority (PHA) but was classified as a High Performing PHA during the reporting program year by the U.S. Department of Housing & Urban Development (HUD).

Just this year, 2025, WHA scored 90 or higher at all of its properties as part of HUD's NSPIRE inspections, including the agency's first ever 100 score.

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 City of Worcester continues to address barriers to affordable housing through a variety of coordinated initiatives and service referrals, including the work conducted by the Human Rights Office. Since June 2024, under new leadership, the Office has expanded its efforts to support residents facing housing-related challenges by facilitating access to appropriate legal and social resources.

The Human Rights Office routinely refers housing-related complaints and concerns to relevant external and internal agencies. These referrals include, but are not limited to: Community Legal Aid (CLA), the Massachusetts Commission Against Discrimination (MCAD), the Housing Court and its Court Service Center resources (such as the Lawyer for the Day program), as well as City departments including Inspectional Services and the Department of Health and Human Services.

Staff within the Office bring extensive expertise in housing, civil rights, and anti-discrimination law, enabling the team to effectively assess incoming concerns and connect individuals to appropriate avenues for support or resolution.

Complaints received include concerns with landlords, habitability conditions, rent disputes, or eviction risks. Ongoing documentation and analysis of these complaints also help to inform broader City policy and programmatic responses aimed at alleviating housing barriers. The office has fielded 11 formal housing complaints between June 2024 and July 2025.

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

November 2024, the City launched a Community Development Survey to reassess the needs of Worcester residents. Survey responses revealed a continued and urgent need for housing and outreach services for individuals who are homeless or at risk of homelessness. Additionally, residents expressed a strong demand for job training and placement programs, youth services, and affordable childcare.

While the City remains committed to investing in these critical areas, the persistent high level of need requires ongoing collaboration and effective communication with numerous partner agencies. Over the past year, the City has strengthened relationships with community partners through on-site visits to local non-profits, project coordination meetings at City Hall, and weekly Zoom meetings with agencies participating in the City's Continuum of Care coordination efforts.

To improve service accessibility for residents who speak languages other than English, the City has continued its partnerships with organizations that provide services in native languages or offer

interpretation support. Particular attention has been given to serving Worcester’s large Spanish-, Portuguese-, and Vietnamese-speaking populations. In response to a recent increase in Haitian Creole-speaking residents seeking services, the City and its partner agencies have expanded the use of dial-in language services for French and other emerging language needs.

The City has also improved the on-site experience for residents visiting City Hall. This year, photo ID badges were implemented for all City employees, and a self-service check-in kiosk was installed on the first floor to help guide visitors. Designated visitor parking spots have been added along Main Street, including accessible parking spaces, and all visitors can now enter through the front entrance, where security and information personnel are available to provide assistance.

The City remains committed to identifying underserved needs and improving access to services—both at City Hall and through the many partner agencies supported by Community Development Block Grant (CDBG) and other City-administered funds.

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

The Worcester Lead Abatement Program was awarded a \$4.1 million Lead Hazard Reduction Control Grant from the HUD Office of Healthy Homes in 2023 for lead paint and soil abatement of low income and very low-income housing units, as well as the provision of primary prevention services to low- and moderate-income families with children under the age of 6. The City’s Housing Development Division (HDD) administers the Worcester Lead Abatement Program providing up to \$30,000 per unit to assist with lead abatement in properties with LMI tenants. HDD also coordinates the Massachusetts “Get the Lead Out” loan program funded by MassHousing for additional abatement assistance over \$30,000.

CDBG funded housing projects over \$25,000 undergo deleading in conjunction with the scheduled rehabilitation. A lead report will be obtained prior to rehabilitation for projects between \$5,000 and \$24,999. This cycle, the City had assessed 78 units for lead hazards and completed de-leading in 40 units of LMI housing totaling \$1,400,000 in HUD lead funding. \$133,094 was utilized in match funding. The 2023 LHR grant cycle aims to assess 195 units for lead hazards and complete lead abatement in 165 units before 2027. In January 2025, the Program was awarded a \$2 million Healthy Homes Grant. The goal of the new grant is to conduct healthy homes improvements in 90 units.

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

Approximately 19.8% of Worcester residents live below the poverty line, nearly 10 percentage points higher than the state average of 10.4%. Among children under 18 in Worcester, the poverty rate is even higher, at approximately 26%. In response, the City continues to prioritize the use of HUD entitlement funds to benefit low- and extremely low-income residents. Efforts also focus on promoting self-sufficiency through employment training, job placement programs, and essential life skills services such as financial counseling and housing stabilization support. The Executive Office of Economic Development (EOED) works closely with partner agencies to coordinate programs and initiatives aimed at reducing

poverty across the City.

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

Since its formation in July 2014, the Worcester City and County Continuum of Care (CoC) Board has served as the lead decision-making body for homeless services in Worcester County. The Board operates through key committees, including HMIS Data Collection, Program Outcomes and Monitoring, Mainstream Resources, Veterans, and Coordinated Entry.

The Program Outcomes and Monitoring Committee, chaired by the City of Worcester's Department of Health & Human Services, continues to lead efforts to track system performance and progress toward ending homelessness. The Central Massachusetts Housing Alliance, Inc. (CMHA), as the CoC's lead agency, partners with the City and CoC-funded organizations to manage the Coordinated Entry System, which improves access to housing and services across Worcester County.

Two weekly workgroups—focused on families and individuals—maintain policies that prioritize those with the highest needs, especially chronically homeless households. While the CoC supports a Housing First approach, it acknowledges some programs must follow funding-mandated prioritizations based on population characteristics.

HMIS, managed by CMHA and supported by ESG funding, enables consistent data collection across CoC and ESG-funded programs. Along with Point-in-Time counts, HMIS data supports resource allocation and system planning. The City has also funded infrastructure upgrades and inter-agency collaboration to strengthen the overall homeless response system.

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

The Executive Office of Economic Development (EOED) continues to foster strong relationships and enhance coordination between public and private housing and social service providers across the City. Development of the Consolidated Plan benefited from input from a wide range of stakeholders through interviews, focus groups, and participation in public meetings and hearings. Participating entities included agencies with expertise in housing, youth services, case management, mental health, education, employment assistance, basic needs, and health services.

During the fifth year of the current planning period (2024 – 2025), the City expanded its engagement with agencies participating in the Continuum of Care (CoC), led by the Central Massachusetts Housing Alliance (CMHA). The City's Housing Division maintains a close partnership with CMHA and has worked collaboratively with CoC member agencies to inform the development of Worcester's next Five-Year Consolidated Plan. This engagement has included regular participation in inter-agency Zoom meetings, where partners discuss housing priorities, system coordination, and emerging service needs.

The City of Worcester remains actively engaged in strengthening coordination efforts with private and public interests, as well as social service agencies to support broader economic and community development goals. EOED, through its Business Assistance Division, plays a leadership role in the Worcester Business Resource Alliance (WBRA), a centralized network of business professionals, technical assistance providers, lenders, and community development organizations that collectively serve entrepreneurs, small business owners, and managers.

To further support local housing coordination, the City has convened interdepartmental working groups that include representatives from departments such as Economic Development, Inspectional Services, and Human Rights. These working groups offer a platform for addressing issues such as rental conditions, code enforcement, access to affordable housing, and other challenges facing low-income and vulnerable populations.

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

Please see attached the results of the impediments to fair housing attached to this report.

CR-40 - Monitoring 91.220 and 91.230

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

The City of Worcester has established comprehensive procedures to ensure compliance with all program requirements for the CDBG, HOME, HOPWA, and ESG entitlement programs. Projects are closely monitored to confirm their alignment with the goals outlined in both the Annual Action Plan and the Five-Year Consolidated Plan. Monitoring efforts also track progress toward the benchmarks and milestones detailed in grant agreements.

Each project is assigned a monitor responsible for overseeing compliance. Special attention is given to first-time subrecipients of entitlement funds administered by the City. Monitors use "desktop audits" to assess program performance, reviewing subrecipient Project Cash Request (PCR) documentation to evaluate both expenditure timeliness and progress toward program outcomes.

In addition to desktop reviews, monitors conduct at least one on-site visit per program year for each funded activity. These visits allow staff to verify compliance with federal regulations and ensure that subrecipients are actively working toward the objectives in their agreements with the City. Site visits also offer subrecipients technical assistance and feedback on program administration.

As part of ongoing oversight, monitors conduct program-specific risk assessments to determine which subrecipients require more intensive monitoring. Subrecipients are considered high-risk if they:

- Have limited experience with entitlement funding;
- Experience high turnover in key staff positions;
- Frequently alter their mission, goals, or programming;
- Have a history of compliance or performance issues, such as missed deadlines, late reports, or unresolved audit findings;
- Are managing multiple CDBG, HOME, ESG, or HOPWA-funded activities simultaneously.

Based on risk assessments, monitors may schedule more frequent site visits. All visits are scheduled in advance, and subrecipients are informed of the purpose and scope beforehand.

During site visits, monitors review subrecipient files for compliance with administrative, financial, and programmatic requirements. They also confirm adherence to agreed-upon timelines and budgetary goals. The City of Worcester's monitoring checklist is used to document the visit, and monitors keep a written record of their findings. After the visit, a formal monitoring letter is issued summarizing results.

If any concerns or findings of noncompliance are identified, the City will issue a follow-up letter with recommended corrective actions. When a formal finding is issued, the letter will include a specific deadline for resolution. The monitor is responsible for verifying that corrective actions are completed by the deadline.

Should a subrecipient materially fail to meet the terms of their agreement or violate applicable federal regulations, the City may suspend or terminate the agreement through formal written notice.

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 Five (5) Year Consolidated Plan informed the fifth year (2024-2025) annual action plan outreach and funding recommendation process. The Community Development Advisory Committee (CDAC) serves as the formal body of citizens providing input on applications submitted as part of the city's CDBG Request For Proposal (RFP) process. CDAC is comprised of ten members, with two from each of Worcester's five city council districts. CDAC met remotely between February and April, 2025 to review and evaluate CDBG proposals for Public Services, Public Facilities, and interdepartmental submissions from municipal departments. The Request for Proposals was released on January 7th, 2025 and concluded on February 11th, 2025. CDAC issued initial recommendations on funding allocations for CDBG projects and programs. Recommendations are then subject to approval through the City Manager and undergo a City Council approval process.

The HOPWA Advisory Committee vetted HOPWA proposals. This committee is composed of experts in community health and the HIV/AIDS field in Worcester County and Connecticut. The process is similar to CDAC in its review, including holding a remote public meeting to introduce the HOPWA process and guidelines, a technical assistance meeting for interested applicants, and a review and ranking session held in public at City Hall. Recommendations were then sent to city administration for approval.

ESG proposals, vetted by the ESG RFP Review Committee comprised of members of the Worcester City and County Continuum of Care (CoC). The ESG RFP Review Committee followed a similar process to the CDAC in its review, including holding a remote public meeting to introduce the ESG process and guidelines, a technical assistance meeting for interested applicants, and an RFP review and ranking session at City Hall. Recommendations were then sent to city administration for approval.

This draft of the proposed Consolidated Annual Performance Evaluation Report (CAPER) reviewing the period of July 1, 2024, through June 30, 2025, was released for citizen review and comments as advertised in the Worcester Telegram & Gazette on **September 10, 2025 for a 15-day public comment**

period from September 10, 2025, through September 25, 2025. The full draft of the CAPER was made available on the City Website. In addition, a physical copy of the draft CAPER was made available during regular business hours between 8:30 a.m. and 5:00 p.m., Monday through Friday at the Neighborhood Development Division office located at 455 Main Street, Ste 405, Worcester, MA 01608.

CR-45 - CDBG 91.520(c)

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

The City continues to adapt to the gradual decline in available funds by prioritizing the use of diverse funding sources for project implementation, supporting non-profit partners, and providing technical assistance to community partners.

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

No

CR-50 - HOME 24 CFR 91.520(d)

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

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

Regular HOME rental inspections resumed during the program year. The monitoring of all HOME units occurred via desk audit with a risk based and size based inspection and onsite monitoring schedule to be followed. Post HUD waivers provided through the pandemic the schedule for monitoring has changed slightly. Full desktop monitoring is requested by subrecipients in the Fall of 2024 will include another opportunity to monitor the units by inspecting a sample of the units. Based on HUD's schedule each project will be physically inspected at least every 3 years per 91.520(d). Per HUD's guidance we proactive enhanced monitoring and providing technical assistance. This year onsite monitoring occurred at the following addresses:

660 Main Street

73 Merrick Street

120 Washington Street

2 Lincoln Square

485 Grove Street

Since there has been a break in the monitoring schedule during the pandemic all units will have an onsite inspection by this November. After that based on HUD's schedule each project will be physically inspected at least every 3 years per 91.520(d).

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

City of Worcester shall require all rental and homebuyer projects/programs containing five (5) or more HOME-assisted housing units to develop and follow affirmative marketing procedures. The affirmative marketing procedures must be approved by City of Worcester prior to marketing any HOME-assisted housing unit. The affirmative marketing procedures must continue throughout the period of affordability and must contain the following:

- Targeting: Identify the segments of the eligible population which are least likely to apply for housing without special outreach efforts.
- Outreach: Outline an outreach program which includes special measures designed to attract

those groups identified as least likely to apply and other efforts designed to attract persons from the total population.

- Indicators: State the indicators to be used to measure the success of the marketing program as well as the manner and frequency in which those indicators will be reviewed.
- Staff Training: Demonstrate the capacity to provide training and information on fair housing laws and objectives to staff.
- Projects/Programs are required to make a good faith effort to carry out the provisions of their approved affirmative marketing procedures. Good faith efforts are documented activities such as:
 - Advertising in print and electronic media that is used and viewed or listened to by those identified as least likely to apply.
 - Marketing housing to specific community, religious or other organizations frequented by those least likely to apply.
 - Developing a brochure or handout that describes the facility and any services to be provided as well as the accessibility for persons with physical disabilities.
 - Insuring that the sales/management staff has read and understands the Fair Housing Act and the purpose and objectives of the affirmative marketing procedures.

In addition, all programs/projects should use the Equal Housing Opportunity logo on-site or slogan in press releases and advertisements and display a fair housing poster in their management office. The program/project must keep files documenting affirmative marketing efforts which will include: copies of correspondence, public advertisements, lists of areas in which flyers have been distributed, contacts with other Equal Opportunity agencies, and any other relevant documents.

During the routine HOME monitoring visits, City of Worcester has reviewed the affirmative marketing files as well as the indicators that the program/project used to measure the success of the affirmative marketing procedures. City of Worcester will indicate any corrective action that is required in the City's monitoring report.

In the event that a project/program violates the City of Worcester Affirmative Marketing Policy, City of Worcester will counsel the owner about the proper program procedures to ensure future compliance. If there is a second incidence of noncompliance, or in any event of willful noncompliance, the owner will be required to seek counseling from the City of Worcester Fair Housing Center. Upon further noncompliance, the owner will be barred from future participation in City of Worcester HUD-funded programs and face possible foreclosure of the lien.

The City of Worcester's HOME program will also require that property owners market available units to low-income residence through the Worcester Housing Authority. The WHA has partnered with www.Gosection8.com, which provides an enhanced program to list rental properties online. Listings are available to potential Housing Choice Voucher tenants seeking apartment units, duplexes or single-family homes in the private market in the City of Worcester. Like the Neighborworks Homeownership website, www.Gosection8.com will help to market available units further to regional rental prospects.

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

Program Income was used for 120 Washington Street project in the amount of \$203,388.85.

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

housing). 24 CFR 91.320(j)

Worcester is currently at 10,205 Subsidized Housing Inventory Units, which is 12.14%. With 10,205 Subsidized Housing Inventory Units, this places Worcester 2nd in the State behind Boston for the most Subsidized Housing Inventory available to the Community. Worcester has more subsidized housing inventory than the top 11 Subsidized Housing Inventory producing Cities & Towns in Worcester County Combined (Fitchburg - 1486, Leominster - 1456, Gardner - 1356, Westborough - 974, Shrewsbury - 860, Webster - 722, Milford - 708, Northborough - 610, Clinton - 549, Southbridge - 499, & Southborough 472). The 12.14% number would be higher as the State only counts units which have a long term affordability (30 years or more). Some of the units which are currently affordable, but wouldn't make the list are units where long term affordability wouldn't make sense. These include First time home buyers (5 years) and units which receive smaller amounts for rehab to make sure units are in compliance with code violations (5-15 years). The direct benefit to the owner is making units more affordable through a grant or for a renter to occupy a safe unit, free of code violations, and affordable according the HUD rental limits. All the HOME program funds less 10% for grantee program admin and about 20-25% on average of CDBG funds sub-granted to the Executive Office of Economic Development – Housing Division create or maintain affordable units throughout the City of Worcester. Over the last year 83 units of affordable housing have come online, with a commitment of at least 44 more units in the next 2-3 years.

CR-55 - HOPWA 91.520(e)**Identify the number of individuals assisted and the types of assistance provided**

Table for report on the one-year goals for the number of households provided housing through the use of HOPWA activities for: short-term rent, mortgage, and utility assistance payments to prevent homelessness of the individual or family; tenant-based rental assistance; and units provided in housing facilities developed, leased, or operated with HOPWA funds.

Number of Households Served Through:	One-year Goal	Actual
Short-term rent, mortgage, and utility assistance payments	90	94
Tenant-based rental assistance	50	53
Units provided in transitional housing facilities developed, leased, or operated with HOPWA funds	0	0
Units provided in permanent housing facilities developed, leased, or operated with HOPWA funds	2	6
Total	146	153

Table 13 – HOPWA Number of Households Served

CR-58 – Section 3

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

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

Table 14 – Total Labor Hours

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers					
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.					
Technical assistance to help Section 3 business concerns understand and bid on contracts.					
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.					
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.					
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.					
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					

Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.					

Table 15 – Qualitative Efforts - Number of Activities by Program

Narrative

This year, the City began construction on the Roosevelt Elementary School Exterior Site Improvements project. This project is subject to section 3 and efforts have been made to meet quantitative section 3 benchmarks for local and low-income labor hours. Data for this project is not yet available and will be reported in the Year 51 CAPER following project conclusion.

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

ESG Supplement to the CAPER in *e-snaps*

For Paperwork Reduction Act

1. Recipient Information—All Recipients Complete

Basic Grant Information

Recipient Name	WORCESTER
Organizational DUNS Number	065782578
UEI	
EIN/TIN Number	046001418
Identify the Field Office	BOSTON
Identify CoC(s) in which the recipient or subrecipient(s) will provide ESG assistance	Worcester City & County CoC

ESG Contact Name

Prefix	Mr
First Name	James
Middle Name	A
Last Name	Brooks
Suffix	
Title	Director of Housing Development

ESG Contact Address

Street Address 1	455 Main St.
Street Address 2	
City	Worcester
State	MA
ZIP Code	01608-
Phone Number	5087994100
Extension	31427
Fax Number	
Email Address	brooks@worcesterma.gov

ESG Secondary Contact

Prefix	
First Name	
Last Name	
Suffix	
Title	
Phone Number	
Extension	
Email Address	

2. Reporting Period—All Recipients Complete

Program Year Start Date	07/01/2024
Program Year End Date	06/30/2025

3a. Subrecipient Form – Complete one form for each subrecipient

Subrecipient or Contractor Name: WORCESTER

City: WORCESTER

State: MA

Zip Code: 01608,

DUNS Number: 065782578

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Unit of Government

ESG Subgrant or Contract Award Amount: 68004.15

Subrecipient or Contractor Name: SOUTH MIDDLESEX OPPORTUNITY COUNCIL INC

City: Framingham

State: MA

Zip Code: 01702, 8313

DUNS Number: 030806830

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 100850

Subrecipient or Contractor Name: CENTRAL MASSACHUSETTS HOUSING ALLIANCE INC

City: Worcester

State: MA

Zip Code: 01609, 2706

DUNS Number: 152234865

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 15000

Subrecipient or Contractor Name: Veterans, Inc.

City: Worcester

State: MA

Zip Code: 01605, 2600

DUNS Number: 941967796

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 70892.07

Subrecipient or Contractor Name: Dismas House of Massachusetts, Inc.

City: Worcester

State: MA

Zip Code: 01603, 2609

DUNS Number: 187596007

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 14338.22

Subrecipient or Contractor Name: The Bridge of Central MA

City: Worcester

State: MA

Zip Code: 01602, 3414

DUNS Number: 097451108

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 81932.71

Subrecipient or Contractor Name: Living in Freedom Together, Inc.

City: Worcester

State: MA

Zip Code: 01609, 2560

DUNS Number: 080615617

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 39460.64

Report: CAPER

Period: 7/1/2024 - 6/30/2025

Your user level here: Data Entry and Account Admin

Step 1: Dates

7/1/2024 to 6/30/2025

Step 2: Contact Information

First Name	Stephen
Middle Name	
Last Name	connelly
Suffix	
Title	
Street Address 1	455 Main Street
Street Address 2	
City	Worcester
State	Massachusetts
ZIP Code	01601
E-mail Address	connellys@worcesterma.gov
Phone Number	(508)799-1400
Extension	31428
Fax Number	(508)799-1406

Step 4: Grant Information

Emergency Shelter Rehab/Conversion

Did you create additional shelter beds/units through an ESG-funded rehab project	No
Did you create additional shelter beds/units through an ESG-funded conversion project	No

Data Participation Information

Are there any funded projects, except HMIS or Admin, which are <u>not listed on the Project, Links and Uploads form</u> ? This includes projects in the HMIS and from VSP	No
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Step 5: Project Outcomes

Project outcomes are required for all CAPERS where the program year start date is 1-1-2021 or later. This form replaces the narrative in CR-70 of the eCon Planning Suite.

From the Action Plan that covered ESG for this reporting period copy and paste or retype the information in Question 5 on screen AP-90: "Describe performance standards for evaluating ESG."

As part of the process of allocating ESG funds through the City's RFP process, there are established performance standards to evaluate ESG program sub-recipients. Under the "Project Narrative & Description" section, sub-recipients provide a method for tracking clients, measured through recording individual client or household level data. Sub-recipients predict the unduplicated number of families/persons that will benefit from the activity (output) and the cost to provide the service. Desk monitoring occurs with every payment request submission. On a quarterly basis, ESG sub-recipients submit HMIS generated Performance Reports to measure progress alongside financial drawdowns for each project. In Person monitoring has returned in 2024, each agency six (6) in total had an in person monitoring scheduled/completed of 8 Programs within 6 Agencies for 2022-23. The City also encompassed a monitoring of an agency funded during the pandemic as well.

Based on the information from the Action Plan response previously provided to HUD:

1. Briefly describe how you met the performance standards identified in A-90 this program year. *If they are not measurable as written type in N/A as the answer.*

Performance measures were determined by requisition reports and quarterly reports by the subrecipient, with follow up during in agency monitoring.

2. Briefly describe what you did not meet and why. *If they are not measurable as written type in N/A as the answer.*

All agencies met or exceeded their goals and were paid accordingly, be it shelter beds, rental assistance ,or supportive services per client provided.

OR

3. If your standards were not written as measurable, provide a sample of what you will change them to in the future? *If they were measurable and you answered above type in N/A as the answer.*

n/a

Step 6: Financial Information

ESG Information from IDIS

As of 8/22/2025

FY	Grant Number	Current Authorized Amount	Funds Committed By Recipient	Funds Drawn	Balance Remaining	Obligation Date	Expenditure
2024	E24MC250026	\$358,347.00	\$80,387.31	\$59,935.63	\$298,411.37	8/28/2024	8/28/2026
2023	E23MC250026	\$371,989.00	\$371,989.00	\$300,999.87	\$70,989.13	7/17/2023	7/17/2025
2022	E22MC250026	\$392,016.00	\$295,559.06	\$293,481.88	\$98,534.12	10/24/2022	10/24/2024
2021	E21MC250026	\$393,826.00	\$393,826.00	\$346,129.91	\$47,696.09	10/27/2021	10/27/2023
2020	E20MC250026	\$385,068.00	\$385,068.00	\$360,678.54	\$24,389.46	12/22/2020	12/22/2022
2019	E19MC250026	\$370,659.00	\$370,659.00	\$370,659.00	\$0	9/11/2019	9/11/2021
2018	E18MC250026	\$355,942.00	\$355,942.00	\$355,942.00	\$0	9/12/2018	9/12/2020
2017	E17MC250026	\$627,242.00	\$627,242.00	\$627,242.00	\$0	9/22/2017	9/22/2019
2016	E16MC250026	\$363,513.00	\$363,513.00	\$363,513.00	\$0	9/1/2016	9/1/2018
2015	E15MC250026	\$366,487.00	\$366,487.00	\$366,487.00	\$0	9/23/2015	9/23/2017
Total		\$4,615,968.00	\$4,241,551.37	\$4,075,947.83	\$540,020.17		

Expenditures	2024 Yes	2023 Yes	2022 Yes	2021 Yes	2020 Yes
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY2020 Annual ESG Funds for
Homelessness Prevention	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-COVID
Rental Assistance					
Relocation and Stabilization Services - Financial Assistance					
Relocation and Stabilization Services - Services					
Hazard Pay (unique activity)					
Landlord Incentives (unique activity)					
Volunteer Incentives (unique activity)					
Training (unique activity)					
Homeless Prevention Expenses	0.00	0.00	0.00	0.00	
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY2020 Annual ESG Funds for
Rapid Re-Housing	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-COVID
Rental Assistance		1,760.19	20,722.00	1,632.00	
Relocation and Stabilization Services - Financial Assistance					
Relocation and Stabilization Services - Services					
Hazard Pay (unique activity)					
Landlord Incentives (unique activity)					

Volunteer Incentives (<i>unique activity</i>)					
Training (<i>unique activity</i>)					
RRH Expenses	0.00	1,760.19	20,722.00	1,632.00	
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY2020 Annual ESG Funds for
Emergency Shelter	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-COVID
Essential Services	14,386.79	106,400.33	27,809.20		18,300.00
Operations					
Renovation					
Major Rehab					
Conversion					
Hazard Pay (<i>unique activity</i>)					
Volunteer Incentives (<i>unique activity</i>)					
Training (<i>unique activity</i>)					
Emergency Shelter Expenses	14,386.79	106,400.33	27,809.20	0.00	18,300.00
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY2020 Annual ESG Funds for
Temporary Emergency Shelter	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-COVID
Essential Services					
Operations					
Leasing existing real property or temporary structures					
Acquisition					
Renovation					
Hazard Pay (<i>unique activity</i>)					
Volunteer Incentives (<i>unique activity</i>)					
Training (<i>unique activity</i>)					
Other Shelter Costs					
Temporary Emergency Shelter Expenses					
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY2020 Annual ESG Funds for
Street Outreach	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-COVID
Essential Services		38,629.99	3,036.85		
Hazard Pay (<i>unique activity</i>)					
Volunteer Incentives (<i>unique activity</i>)					
Training (<i>unique activity</i>)					
Handwashing Stations/Portable Bathrooms (<i>unique activity</i>)					
Street Outreach Expenses	0.00	38,629.99	3,036.85	0.00	
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY2020 Annual ESG Funds for

Other ESG Expenditures	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-C
Cell Phones - for persons in CoC/YHDP funded projects (<i>unique activity</i>)					
Coordinated Entry COVID Enhancements (<i>unique activity</i>)					
Training (<i>unique activity</i>)					
Vaccine Incentives (<i>unique activity</i>)					
HMIS		12,467.03	2,299.13	1,558.74	
Administration	20,390.99	3,185.15	1,077.33	63.81	3
Other Expenses	20,390.99	15,652.18	3,376.46	1,622.55	3
	FY2024 Annual ESG Funds for	FY2023 Annual ESG Funds for	FY2022 Annual ESG Funds for	FY2021 Annual ESG Funds for	FY20
	Non-COVID	Non-COVID	Non-COVID	Non-COVID	Non-C
Total Expenditures	34,777.78	162,442.69	54,944.51	3,254.55	18,7
Match					
Total ESG expenditures plus match	34,777.78	162,442.69	54,944.51	3,254.55	18,7

Total expenditures plus match for all years

Step 7: Sources of Match

	FY2024	FY2023	FY2022	FY2021	FY2020	FY2019	FY2018	FY2017	FY2016	FY2015
Total regular ESG plus COVID expenditures brought forward	\$34,777.78	\$162,442.69	\$54,944.51	\$3,254.55	\$18,715.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total ESG used for COVID brought forward	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total ESG used for regular expenses which requires a match	\$34,777.78	\$162,442.69	\$54,944.51	\$3,254.55	\$18,715.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Match numbers from financial form	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Match Percentage	0.00%	0.00%	0.00%	0.00%	0.00%	0%	0%	0%	0%	0%

Match Source

Other Non-ESG HUD Funds

Other Federal Funds

State Government 1,000,046.86 62,442.69 54,944.51 3,252.55 18,715.39

Local Government

Private Funds 197,385.33

Other 100,000.00

Fees

Program Income

Total Cash Match 1,197,432.19 162,442.69 54,944.51 3,252.55 18,715.39 0.00 0.00 0.00 0.00 0.00

Non Cash Match

Total Match 1,197,432.19 162,442.69 54,944.51 3,252.55 18,715.39 0.00 0.00 0.00 0.00 0.00

Step 8: Program Income

Program income is the income received by the recipient or subrecipient directly generated by a grant supported activity. Program income is defined in 2 CFR §200.307. More information is also available in the ESG CAPER Guidebook in the resources tab above.

Did the recipient earn program income from any ESG project during the program year?

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