



**TOWN OF CONCORD**  
**COMMUNITY PRESERVATION COMMITTEE**  
 141 KEYES ROAD, CONCORD, MA 01742  
 TEL. (978) 318-3290 FAX (978) 318-3291

**Application for CPA Funding**  
**Due no later than 4:00pm on Friday, September 21, 2018**

Applicant: Town of Concord

Co-Applicant (if applicable): N/A

Project Name: Regional Housing Services Program

Project Location/Address: N/A

Purpose: (Select all that apply)

- Open Space       Community Housing       Historic Preservation       Recreation

Project Budget:

Amount of CPA Funds Requested: \$ 19,000

Amount from Other Funding Sources: \$ 19,000

Total Project Budget: \$ 38,000

(If multi-year project, note current phase only)

Please check which of the following is included with this Application:

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> One Paragraph Project Summary *         | <input checked="" type="checkbox"/> Timeline*   |
| <input type="checkbox"/> Map (if applicable)                                | <input type="checkbox"/> Architectural plans, site plans, photographs (if appropriate)                                |
| <input checked="" type="checkbox"/> Narrative *                             | <input type="checkbox"/> Copy of Audit or most recent Financial Information ( <u>Non Profit Organizations Only</u> )* |
| <input checked="" type="checkbox"/> Selection Criteria and Needs Assessment | <input type="checkbox"/> Letters of Support (if any)  |
| <input checked="" type="checkbox"/> Detailed Project Budget *               |   |
| <input checked="" type="checkbox"/> Feasibility Assessment                  |   |
| <input type="checkbox"/> Statement of Sustainability (if applicable)        |   |

\*Required Documentation

The Contact Person for this Project is: Marcia Rasmussen, Director, DPLM

All Correspondence should be mailed to: Town of Concord, 141 Keyes Road, Concord, MA 01742

The Contact Person can be reached by phone at 978-318-3290 or by email at: [mrasmussen@concordma.gov](mailto:mrasmussen@concordma.gov)

Signature of Applicant: *Marcia Rasmussen*

Signature of Property Owner (if different): *Chi Fh White 9/18/18*

**For Historic Preservation Projects Only** – please check the box below left and acknowledge:

- I/We have read the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties and understand that planning for and execution of this project must meet these standards.

## **Brief Project Summary**

The Town of Concord requests Community Preservation Act funding in the amount of \$19,000 for Concord's continued participation in the Regional Housing Services Program. The Regional Housing Services Office (RHSO) was established in 2011 to oversee the administration of affordable housing programs in Concord and five neighboring communities. Since that time, the RHSO has expanded to oversee seven communities including Acton, Bedford, Burlington, Lexington, Sudbury and Weston. The RHSO provides professional staff support to all seven communities in meeting the administrative and monitoring needs of their existing affordable housing programs, while also working with each community to develop additional programs and further regional housing efforts and goals.

## **Narrative**

The Regional Housing Services Program is an invaluable resource to the Town for both developing new and maintaining existing affordable housing units. Affordable units are created with the understanding that they will remain affordable in perpetuity, but their monitoring needs, and the administrative and regulatory requirements involved in maintaining their affordability, are rarely considered. As a result, as Concord's affordable housing inventory has grown, so has the Town's need for expert assistance in developing, reviewing and monitoring these units. The Regional Housing Services Office (RHSO) was created in 2011 to address these needs by providing part time professional affordable housing assistance to Concord and six other communities. The RHSO is now in its eighth successful year of operation and has relocated to renovated office space at 37 Knox Trail. The Office has grown as the affordable housing needs of its member communities has evolved, and continues to meet its anticipated budget and staffing expectations. The Town of Concord continues to serve as the lead community for the RHSO.

The RHSO meets the Community Housing needs of its member communities by providing expert staff and administrative services. In Concord, the RHSO provides:

- 1) Monitoring - RHSO staff monitors Concord's existing affordable home ownership and rental units to ensure that they remain affordable and in compliance with their deed restrictions. RHSO staff regularly updates a database of Concord's existing affordable units which they created a few years ago to better assist the Town in monitoring and maintaining these units. The Town's monitoring responsibilities include the 723 units on the State's Subsidized Housing Inventory (SHI) as well as any locally produced affordable units.
- 2) SHI Administration - Listing SHI units is a detailed and sometimes complicated process, especially for those units created through a local initiative program (such as the special permit Planned Residential Development provision in the Town's Zoning Bylaw) which can be greatly assisted by the knowledge and expertise of professional housing staff. RHSO staff continues to assist the Town in maintaining Concord's SHI information and in adding new units to the inventory as they become available. Through the RHSO's assistance, Concord's SHI is now officially at 10.04%.
- 3) HOME Administration - As recommended in the 2005 Comprehensive Long Range Plan, Concord has been a member of the WestMetro HOME Consortium since 2010, which provides Federal funds through the HOME program for community housing efforts in member communities. RHSO staff regularly provides assistance to Town staff in meeting the administrative requirements of this program and was instrumental in gaining approval for Concord's first two HOME-assisted projects for the Concord Housing Authority. RHSO staff assisted with the completion of rehabilitation work at the CHA's Thoreau Street units and continues to work with the CHA on the construction of four new units at

the Peter Bulkeley Terrace building. RHSO staff were instrumental in securing additional HOME funds for the Peter Bulkely construction, which reduced the funds needed from the Community Preservation Act.

- 4) Local Support for Concord's Housing Non-Profits - RHSO staff is also made available to Concord's affordable housing non-profits to assist and guide their efforts both in developing initiatives and completing specific projects. In addition, RHSO staff provide their expertise to assist non-profits in developing an understanding of the types of affordable housing units and levels of affordability most needed in the community. RHSO staff is currently working with the Concord Housing Development Corporation (CHDC) on the development of their Junction Village project and the continued administration of the Small Grants Program.
- 5) Regional Activities Support – Two years ago, the RHSO launched a new website ([www.rhsohousing.org/](http://www.rhsohousing.org/)) which includes information on member communities existing affordable units, affordable housing assistance programs, and units currently available for purchase or rent. The RHSO continues refinement of the site and has since developed a member only portal that provides more in-depth project information. The RHSO also sponsors educational programs for affordable housing applicants and homeowners and training events for affordable housing property managers. The RHSO worked with the Town's regional planning agency, MAPC, to consider additional ways to promote affordable housing through payments in lieu of units (PILU).

The RHSO has quickly become an indispensable tool for both meeting and sustaining Concord's affordable housing needs and goals. In addition to the services noted above, RHSO staff review and update Concord's affordable housing files; provide training and guidance on the resale and refinancing processes for affordable homeowner units; and work with the Town's Assessing Department to correct assessments on affordable units as needed. For those housing services that are needed only occasionally, the RHSO program also provides services on an a la carte basis. Concord has used these services for the resale of specific affordable housing units in the community and for completing plan updates (for the Community Preservation Committee and for the Housing Production Plan) when needed.

The RHSO program continues to be extremely successful in meeting the needs of its member communities on time and within its estimated budget. The RHSO's annual membership fees are based on the number of affordable housing units included on the State's Subdivided Housing Inventory (SHI) for each community. Over the last few years, Concord has added significantly to this list, and its membership costs have increased accordingly from \$17,474 in the program's first year to just under \$37,000 for the current year.

Each year, the Town must anticipate the potential CPA funding needed for its membership in this program long before the RHSO has calculated the exact fees and staffing requirements for the upcoming year. This year, the Town anticipates that the membership fee will be similar to this year's expense and is budgeting an estimated \$38,000 for the program. While other RHSO communities seek CPA funds for the full program amount, the Town proposes to match the CPA contribution to the program's membership costs by providing 50%, or \$19,000, of the expense from other Town funds. Any funds that are not needed to meet next year's membership expenses will be set aside for any unanticipated affordable housing questions that might require assistance from the RHSO's a la carte program services.

Please see the "Regional Housing Services Office –FY2018 Q4 Status Report" in Attachment A for further information on the work completed to date and the allocation of RHSO time by community.

## CPC's Selection Criteria and Needs Assessment

This application meets the following Selection Criteria as found in the 2019 Community Preservation Plan:

*a. The project's eligibility for CPA funding under the CPA legislation.*

The application meets the criteria for Community Housing under the CPA legislation as it will provide funding for the support of community housing. This application proposes to fund the monitoring and administration of Concord's existing affordable housing stock in addition to assist in developing new affordable housing options, which will support both local and regional affordable housing goals.

*b. The project's consistency with Town-wide planning efforts and reports that have received broad-based scrutiny and input.*

The 2015 Housing Production Plan includes potential strategies for furthering the affordable housing goals of the community. In Chapter 4, "Goals and Strategies," the RHSO is specifically mentioned as a key element in achieving Goal 7, "Continue to nurture and maintain working partnerships with organizations focused on addressing affordable housing needs in Concord and the region," and Goal 8, "Continue to support the monitoring and preservation of existing affordable units." Further, Strategy 11, "Continue to Host and Support Membership in the Regional Housing Services Office," addresses the importance of the program to the success of Concord's affordable housing programs by specifically noting it as a key strategy that the Town should continue to pursue.

This project also serves one of the housing goals found in the 2018 Envision Concord – Bridge to 2030 Comprehensive Plan. **Goal #1 - Develop realistic, achievable targets for preserving or creating housing of all types (beyond the Subsidized Housing Inventory).** Working with the Concord Housing Authority, Concord Housing Development Corporation, Concord Housing Foundation, and other committees and organizations, including local employers, Hugh Cargill Trust Committee, etc., the Town should study the existing status of Concord's housing stock by type and price and create realistic quantitative goals with supporting policies and programs.

*c. The project's support by relevant Town boards and committees and community groups and its consistency with recent Town Meeting actions.*

The Concord Housing Authority and Concord Housing Development Corporation are both working with RHSO staff to develop and implement current housing projects. The Select Board has supported the funding of this program through the CPA and Town budget with an Inter-Municipal agreement has been signed by Town Manager Christopher Whelan with the agreement of the Board. Lastly, Concord's last eight Annual Town Meetings have voted to allocate CPA funding for this program.

*d. The extent to which the project preserves, protects or enhances existing Town-owned open space, recreation, historic and/or housing assets.*

This project directly relates to the preservation, protection and support of Concord's existing community housing stock. A significant portion of the RHSO work in Concord has involved monitoring existing affordable housing units to ensure that the owners and renters continue to meet the requirements of their deed restrictions; maintaining a database to assist with this monitoring in the future; and administering Concord's existing units as listed on the State Subsidized Housing Inventory (SHI).

- e. *The extent to which the project serves multiple or underserved populations.*

This project directly supports under-served populations by working to monitor, support, and preserve Concord's existing low- and moderate-income housing and elder housing facilities, and by studying and analyzing the housing needs of low- and moderate-income households who have few other available means to enter the community.

- f. *Whether or not the project fulfills more than one purpose of the legislation: housing, historic preservation, open space or recreation.*

The project is not intended to fulfill any CPA eligible purposes beyond Community Housing.

- g. *Administrative and financial management capabilities of the applicant.*

The project will be administered through the Town of Concord's Department of Planning and Land Management (DPLM). DPLM is responsible for assisting in the development of the Town's affordable housing and administers its affordable housing programs. DPLM also works directly with local non-profits and developers when new residential housing developments are proposed. The Department has extensive experience in administering CPA funded grants and projects, and the Town has completed all of the requirements of the program and grant funds to date.

- h. *The extent to which the applicant has successfully implemented projects of a similar type and scale or otherwise demonstrated the ability and competency to implement such a project.*

As noted above, the applicant has had a key role in developing and maintaining Concord's existing affordable housing stock and has extensive familiarity with the work proposed. The Planning Division has overseen numerous grant funded projects and has the expertise to implement a project of this scale. As this is an annual program, it is anticipated that not all funding allocations or project requirements may be complete before the next application is submitted.

- i. *Whether the applicant has site control or written consent by the property owner to submit an application.*

This is not applicable.

- j. *Demonstrated financial need.*

The Town will fund 50% of the program costs and will provide additional funding in the form of staff time and services. Without CPA funding to cover the remaining costs, some services provided in the DPLM budget would need to be significantly reduced to accommodate this project and its goals.

- k. *Whether or not there will be multiple sources of funding for the project, including leveraging of other public and/or private funding.*

The Town is allocating \$19,000 to cover 50% of the program fees this year and will continue to provide in-kind services in the form of staff time and program assistance.

- l. *The feasibility of the project plan and whether or not the most reasonable approach for implementing the project has been selected.*

The RHSO is already at work here in Concord and the Town benefits from the availability of their services. The program is performing as anticipated and the Town will continue to be an active participant in its further development.

*m. The urgency of the project, the flexibility of the schedule and the impact of any delay in initiating the project.*

There is an urgent need for the Town to approve this funding to meet the membership fee requirements of the program. The Town receives a great deal of critical assistance from the program and has made a commitment to stay in the program. Any delays in the approval of the funds would require the Town to cut other services or programs to fund this project.

*Additional selection criteria items n. through u. are not applicable.*

### **Budget**

The proposed overall budget of this RHSO application is \$38,000. The expense of running the RHSO is shared between the seven member communities on a percentage basis developed through an analysis of the community's existing affordable housing stock as listed on the State's Subsidized Housing Inventory (SHI). Concord's membership fee represents approximately 16% of the RHSO's time which comes to \$36,455 in FY18. The exact amount of the membership fee for next year is not yet available but the Town anticipates that it will be slightly more than the current year's fee. The remaining funds in this account will be used for any "a la carte" services of the program required by the Town.

### **Feasibility**

An Inter-Municipal Agreement between Concord and the other member communities was signed in March 2011 and renewed in 2017. The Regional Housing Services Office officially opened in July 2011 and relocated to Concord in July 2014. The Town of Concord continues to serve as the lead community for the next three years, per agreement of the other communities. The program is currently underway and performing as anticipated.

### **Timeline**

This is an existing program which already provides support to the Town's programs on an ongoing basis. An advisory committee made up of representatives from each community meets on a quarterly basis to review the status of the program and discuss any regional projects or services. The RHSO staff also meets annually with the Town Managers and Town Administrators to provide an update on the program and receive feedback on various activities.



# Regional Housing Services Office

Serving Acton, Bedford, Burlington, Concord, Lexington, Sudbury, Wayland, and Weston

Office Address: 37 Knox Trail, Acton, MA 01720  
Mailing Address: 2352 Main Street, Suite 2, Concord MA 01742

Website: [WWW.RHSOhousing.org](http://WWW.RHSOhousing.org)  
Email: [INFO@RHSOhousing.org](mailto:INFO@RHSOhousing.org)  
Phone: (978) 287-1092

July 9, 2018

To: John Mangiaratti, Richard Reed, John Petrin, Chris Whelan, Carl Valente, Melissa Murphy-Rodrigues, Nan Balmer, Donna VanderClock, Roland Bartl, Nancy Tavernier, Kristen Guichard, Robert Hummel, Michael Rosen, Jim Doherty, Marcia Rasmussen, Lee Smith, Jerry Evans, Aaron Henry, Carol Kowalski, Meagen Donoghue, Patricia Brown, Lydia Pastuszek, Elizabeth Doucette, Imaikalani Aiu, Sarah Rhatigan  
CC: Dan Gaulin, Lara Plaskon, Liz Valenta  
From: Elizabeth Rust  
RE: Regional Housing Services Office – FY2018 Q4 Status Report

This is the status report for activity from 5/1/2018 through 6/30/18 (FY18 Q4) for Regional Housing Services Office, an inter-municipal collaboration between Acton, Bedford, Burlington, Concord, Lexington, Sudbury, Wayland and Weston. Please let me know if you have any comments or questions.

### **RHSO Program Administration:**

We have completed the 2018 fiscal year, the seventh of operation of the RHSO.

The Inter-Municipal Agreement amendment has been signed by all communities, including Wayland who officially joined the RHSO in March. The FY19 invoices corresponding to the IMA have been issued.

The FY19 budget has been presented and finalized with each community at the Advisory Committee in February. As always, this comes early. Each community is also on a different schedule especially for CPA funding requests in preparation for spring town meetings. FY20 budget planning will start in September.

We acknowledge the many of the Town Manager/Administrators in the RHSO service transitioning in this fiscal year including Acton, Bedford, Burlington, Lexington, Wayland and Weston. We extend our appreciation for all of their support and leadership to the RHSO, and welcome the new managers. We would be pleased to come meet the new leaders and introduce the RHSO and our services.



### **Regional Activities:**

Regional activities are performed for the RHSO communities equally and provide general housing resources, including trainings, reports, information and the website.

The website - [RHSOhousing.org](http://RHSOhousing.org) – continues to be a helpful and useful resource. The website has inventory and property information for the member towns, services for current residents, and listings of properties for new residents with contact information for people to contact directly.

The RHSO prepared a memo on municipal considerations for age-restricted housing. As communities strive to take pro-active steps in planning to ensure that the housing needs of older people are met, it is important to consider how the decision to allow for age-restricted developments might be impacted by various laws.

The RHSO was awarded a grant under the MAPC DLTA program for zoning bylaw recommendations aimed at strengthening the bylaws to be more effective with a focus on payment in lieu of units (PILU) methodologies. MAPC has provided its draft report and the participating communities have had an opportunity for comments. The final report is expected in August.



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The RHSO plans to create a DHCD-approved ready renter list for housing authorities and property managers managing properties with small numbers of LIP rental units. This RHSO service will provide renters for the occasional vacancies in accordance with Affirmative Fair Housing Marketing requirements.

The RHSO worked with the member communities on qualifying for the Housing Choice Program, a new DHCD-sponsored program. Communities that qualify for designation have priority and access to additional state grants.

### SHI Administration

Managing the SHI inventory is a key component of the RHSO services provided. A total of 980 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO. DHCD has published current SHI percentages for all municipalities as part of their biennial update, showing that there are 67 communities over the 10% in Massachusetts.

As 2020 approaches, communities are encouraged to review the annual Housing Unit Review Summary report from UMass Donahue in the fall. This shows what information is being aggregated into the Census, and is the place where tear downs can adequately be reported. The RHSO continues to assist with 2020 SHI projections as requested.

Units can 'lapse' from the SHI if they no longer are eligible. For 40B projects, units will lapse if a building permit is not issued within one year of the Comprehensive Permit, or 18 months between building and occupancy permits. Some units qualify as 'lapsed' from the SHI, though they have not been officially removed.

Additionally DDS units (beds subsidized by the Department of Developmental Services and the Department of Mental Health) can be added and lost with no control or influence of the Town. In this fiscal year, some communities had decreases reported in the number of DDS units.

	SHI 2018					FY18 Details	FY19 Pipeline
	YR Housing Units	SHI Units	% Subsidized	+/- 10%	FY18 SHI Chg		
Acton	8,475	568	6.70%	-280			146 Prospect (1), PO Crossing (3), Kelley's Corner (31), Powder Mill (173)
Bedford	5,322	974	18.30%	442	-3	Cottages (1), Fox Run (1), DDS (-5)	Evergreen (3)
Burlington	9,627	1283	13.33%	320	268	Corporate Drive (270), DDS (-2)	Simonds Park (2)
Concord	6,852	804	11.73%	119	81	Junction Village (83), DDS (-2)	Junction Village (-83)
Lexington	11,946	1328	11.12%	133	-2	Keeler (1), DDS (-9), FarmView (6)	Wright Farm (1), Manor House (6)
Sudbury	5,921	664	11.21%	72			
Wayland	4,957	254	5.12%	-242			11 Hammond (1), Covered Bridge (3)
Weston	3,952	167	4.23%	-228	18	Silver Hill (2), Kendal Village (16)	Warren Ave (2), Village at Silver Hill (-2), Kendal Village (-16)
total	57,052	6042	10.59%	337	362		



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## Monitoring:

The monitoring program is a core service of the RHSO with over 6,000 units of rental and ownership restricted housing across the communities. The table shows the 06/30/18 summary for each community. Note the %affordable for rental housing column: for 40B purposes all the units in the development are able to 'count' as long as at least 20% or 25% meet the affordability requirements from the State, all communities surpass that minimum rental requirement.

AS OF 6/30/18	Rental							Ownership			
	Total SHI rental	%afford able	Total affordable rental	PHA	DDS, DMR	Private		Other Town or Speciali zed	Total	SHI	Other Local or Moder ate
						Affordable	Market				
Acton	501	53%	265	159	28	78	236		68	67	1
Bedford	926	57%	527	100	61	236	399	130	54	48	6
Burlington	1,267	37%	469	107	83	279	798		27	16	11
Concord	753	53%	396	138	32	143	357	83	71	51	20
Lexington	1,315	49%	643	274	70	251	672	48	93	13	80
Sudbury	627	65%	405	92	0	313	222		37	37	0
Wayland	205	81%	166	136	5	25	39		54	49	5
Weston	140	91%	128	0	0	66	12	62	29	27	2
total	5,734	52%	2,999	1,006	279	1,391	2,735	323	433	308	125

**Ownership Units:** For the deed restricted ownership units, the annual monitoring review is performed by:

- Reviewing the registry of deeds.
  - Complete
- Reviewing the owner mailing addresses versus the town database.
  - Complete
- Self-certifications to each owner, 3 mailings
  - Complete
- Providing annual certification reports to DHCD
  - Complete

FINAL	FY18 Self-Declaration			
	Sent	Rec'd	Open	% rec'd
Acton	56	52	4	93%
Bedford	52	48	4	92%
Burlington	24	23	1	96%
Concord	69	67	2	97%
Lexington	13	13	0	100%
Sudbury	34	33	1	97%
Weston	26	24	2	92%
total	274	260	14	95%

The ownership monitoring process establishes clear communication with the owners documenting their obligations, as well as provides a contact for on-going questions. The RHSO has received a 94%-95% response rate in the last two years and FY18 is complete with 95%.

**Rental Projects:** Monitoring the Local Initiative Program (LIP) rental units on behalf on the member communities is also a RHSO service. There are 17 rental projects with 893 units in the RHSO service area where the Towns have the responsibility to monitor the units.

The basic review includes monitoring the Property Manager records and files to ensure that the rents are calculated in accordance with the Regulatory Agreement, that the tenants are recertified using source



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documents according to the regulations, that the units are maintained in accordance with all applicable standards and that tenants are selected in accordance with Fair Housing requirements and current Affirmative Fair Housing Marketing Plans (AFHMP) including advertising requirements.

	Town	Development Name	SHI units	Subsidy Program	Status
1	Acton	Acton Housing Authority	4	LIP 40B	Final report in process
2	Acton	Inn at Robbins Brook	3	LIP-LAU	Final report in process
3	Bedford	Village at Concord Road	12	LIP 40B	Final report in process
4	Bedford	Patriot Place	10	LIP 40B	Complete, to DHCD
5	Bedford	Village at Taylor Pond	200	LIP-LAU	Final report in process
6	Burlington	Arborpoint	34	LIP-LAU	Not in scope
7	Concord	Concord Mews	350	LIP 40B	Summer 2018
8	Concord	Concord Park	16	Local	Complete, to Town
9	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	Complete, to DHCD
10	Concord	Brookside Square	8	LIP-LAU	Complete
11	Concord	Warner Woods	80	MH NEF	Summer 2018
12	Lexington	Avalon at Lexington Hills	97	LIP 40B	Summer 2018
13	Lexington	Avalon Lexington	56	Local	Final report in process
14	Lexington	LexHAB Scattered Sites	9	LIP-LAU	Fall 2018 (FY19)
15	Sudbury	Willis Lake (SHA)	1	LIP-LAU	Complete, to DHCD
16	Wayland	Residences At Wayland Center	12	LIP-LAU	Fall 2018 (FY19)
17	Weston	Church, Jones, Pine Street, Viles Street	4	LIP LAU	Summer 2018
18	Weston	Warren Ave	5	LIP 40B	Complete, to DHCD
			905		

### Town-Specific Monitoring

Other monitoring efforts include assisting residents with refinancing as well as maintaining the inventory with new projects, new owners, and other general updates.

In Acton: Supported the monitoring efforts at Anthem Village/Martin St in resolving lottery issues and preparing the draft affordable housing closing package; Continued supported foreclosure process at 668 MassAve; Completed the monitoring for Acton Housing Authority LIP units.

In Bedford: Supported the town funding and closing at the Bedford Village/447 Concord Road expiring use project with intensive project team and town reviews; Continued to work with new management company at Patriot Place with the certification of rental tenants; Started discussion with developer of Village at Bedford Woods Phase 2.

In Burlington: Assisted Seven Springs with tenant eligibility, reviewed draft assignment and assumption certifications for the Huntington and Tremont.

In Concord: Assisted owners at Elm Brook and Concord Commons with information on resales; Presented to the Moderate Income Eligibility Guidelines regarding refinancing standards to the Planning Board; Completed monitoring for Concord Housing Authority LIP units; Reached out to CHAPA again for latest monitoring at Fairhaven Gardens; Drafted communication to the smaller 100% affordable condominium developments (6 developments, 45 affordable units) to assist with management, Reviewed condo information at Riverbend in relation to upcoming Condo Board meeting.



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In Lexington: Prepared monitoring report for Katahdin Woods; Communicated with Pine Grove condominium on construction progress; and Continued to assist LexHAB with rent policies and income determination, policies and procedures.

In Sudbury: Completed monitoring for Sudbury Housing Authority LIP unit; Continued work with Avalon on leasing the affordable units with site visit, file review and prepared monitoring report.

In Wayland: Continued support on potential foreclosure unit at Wayland Commons; Started investigation into compliance issue at Willowbrook.

In Weston: No monitoring activities this period.

## **HOME Support:**

The activities in the HOME support category assist participating HOME communities (Bedford, Concord, Lexington, Sudbury and Wayland) commit and expend their available Program funds, develop HOME funded programs, as well as completing their administrative requirements. To date, the RHSO has assisted the member communities commit \$1,855,843 since FY13.

In this reporting period the RHSO attended the quarterly HOME meeting in May, prepared for HUD Monitoring visit in July and:

- Bedford: Submitted the Ashby Place HOME project requisition, completed two Tenant-base rental assistance cases (total \$3,732).
- Concord: No Activity.
- Lexington: Continued investigation into using HOME funds for the Pine Grove construction effort.
- Sudbury – Continued to pursue HOME funds for Coolidge Phase 2.

## **Local Support:**

The local support category enables each municipality to have some amount of hours to support priority items that are not covered under other service categories. The following local support activities were performed for each community in this reporting period:

Acton: Reviewed the LIP application for 446 Mass Ave Residences at Kelley's Corner, Supported Comprehensive permit for 146 Prospect Street, Started analysis on feasibility of condo buy-down and rental program; Presented IMA to Selectmen.

Bedford: Continued efforts on the Bedford Housing Study with Steering Committee meetings and Community Workshops; Completed housing Infographic and posted to website.

Burlington: No local support this period.

Concord: Presented Black Birch II affordable unit assessment to Select Board and supported petition to DHCD; Reviewed and commented on proposal for development at 430 Old Bedford; Attended social services assistance meeting between various granting agencies in Concord; Performed initial feasibility for housing on the Gerow property; Assisted the CHDC by assisting with new member recruiting and re-appointments, preparing agendas, packets and minutes, administering the Small Grant Program, drafting various materials for Board review, completing CPC status reports, and for Junction Village: drafting an Open Space RFP, and submitting older invoices for reimbursement; Presented IMA to Selectmen.



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Website: [WWW.RHSOhousing.org](http://WWW.RHSOhousing.org)  
Email: [INFO@RHSOhousing.org](mailto:INFO@RHSOhousing.org)  
Phone: (978) 287-1092

Lexington: Completed and submitted the LIP application for Wright Farm to DHCD; Participated as a panelist at Lexington Housing Speaker series; Completed housing Infographic and posted to website; Presented IMA to Selectmen.

Sudbury: Reviewed four applications and recommended approval for Frost Farm; Prepared closing documents for two units at Grouse Hill; Supported the Sudbury Housing Trust by: preparing agendas, packets and attending monthly meetings, supported the completion of the (ten year) Maynard Road project with the final developer payments, Condo Board establishment and tax payments, supporting the Small Grant Program by processing invoices for awarded funds, and supported the Home Preservation maintenance project by preparing a Grant Application process and informing eligible owners, and performed lottery and resale services by

- o Contracted for new lotteries/units with CHAPA for Sudbury resale unit, Medford Wellington Woods.
- o Completed LIP applications/marketing plans for Fields at Sherborn, Post Office Crossing in Acton, Village Green in Holliston.
- o Submitted applications to DHCD for approval for Corey Street Melrose.
- o Started marketing at Bedford Evergreen.
- o Administered a lottery for Brookside Concord, and performing recertification for Plainville.
- o Completed buyer eligibility for the first units at Lexington Manor House.

Wayland: Reviewed HPP certification for River's Edge with DHCD; Poised to review LIP application at 11 Hammond; Completed housing Infographic and posted to website.

Weston: Completed housing Infographic and posted to website; Assisted the Weston Affordable Housing Trust with its projects and programs, including: preparing meeting agendas and packets, Continued support for the Affordable Home Ownership Opportunity Fund by identifying opportunities including facilitating discussion on DOT properties for potential use for housing, Supported the successful Town warrant article to transfer 0 Wellesley to the Trust and started brainstorming for next steps; Assisted in finalizing the AFHMP for the marketing and lottery for the lease up of two new units at 66-68 Warren Avenue.



# Regional Housing Services Office

Serving Acton, Bedford, Burlington, Concord, Lexington, Sudbury, Wayland, and Weston

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## FY18 Hours and Budget Recap:

The RHSO ended the fiscal year on track to its budget and authorized changes.

This year saw many additional hours purchased, and corresponding contracts adjusted for increased staff. Many thanks to the Concord finance department for their assistance in managing the RHSO Revolving Fund.

	FY18							
	IMA Amount	IMA Hours	Adjustment Amount	Adjustment Hours	FY18 Actual	FY18 Hours paid	FY18 Hours used	% of Total
Starting Balance	\$0							
<b>Income</b>								
Acton	\$22,721	120	\$1,120	20	\$24,091	340	316	10%
Bedford	\$32,024	450	\$9,706	143	\$41,730	592.5	590	18%
Burlington	\$11,030	155	(\$2,242)		\$8,788	155	143	5%
Concord	\$31,312	440	\$5,143	78	\$36,455	518	522	16%
Lexington	\$31,312	440	(\$276)	(4)	\$31,036	436	435	13%
Sudbury	\$59,066	830	\$3,269	50	\$62,335	880	880	26%
Wayland	\$0		\$4,090	62	\$4,090	62	62	2%
Weston	\$24,552	345			\$24,552	345	346	10%
<b>Total</b>	<b>\$212,069</b>	<b>2,980</b>	<b>\$21,010</b>	<b>348</b>	<b>\$233,079</b>	<b>3,328</b>	<b>3,314</b>	<b>100%</b>
<b>Expenses</b>								
Staffing	\$219,340				\$217,494	\$65.35		
Program expenses	\$5,000				\$6,350			
Administrative Cost	\$8,380				\$8,430			
<b>Total Expenses</b>	<b>\$232,720</b>				<b>\$232,274</b>			
Ending Balance	\$359				\$904			
Billing Rate	\$71.16							

	FY18 Actual	FY18 Budget	Actual - Budget
<b>Acton</b>			
Maintenance	46	70	-25
403 Maintenance	66	20	46
Local Support	170	170	-20
Regional Activities	35	40	5
Admin	40	40	0
<b>Total</b>	<b>356</b>	<b>340</b>	<b>4</b>
<b>Bedford</b>			
Maintenance	174	170	43
HOV/E administration	65	68	0.0
Local Support	148	150	2.0
Housing Study	125	125	0.0
Regional Activities	35	40	-4.7
Admin	40	40	0.1
<b>Total</b>	<b>590</b>	<b>593</b>	<b>2.5</b>
<b>Burlington</b>			
Maintenance	30	35	15
Local Support	38	60	22
Regional Activities	36	40	4
Admin	40	40	0
<b>Total</b>	<b>144</b>	<b>155</b>	<b>12</b>
<b>Concord</b>			
Maintenance	84	70	14
HOV/E administration	43	68	-27
Local Support (Town)	162	150	12
Local Support (CHDO)	160	150	10
Regional Activities	35	40	5
Admin	40	40	0
<b>Total</b>	<b>522</b>	<b>518</b>	<b>4</b>
<b>Lexington</b>			
Maintenance	142	150	-7
HOV/E administration	56	46	10
Local Support	161	160	1
Regional Activities	35	40	5
Admin	40	40	0
<b>Total</b>	<b>474</b>	<b>436</b>	<b>1</b>
<b>Sudbury</b>			
Maintenance	95	60	15
HOV/E administration	24	20	4
Local Support (Town)	162	235	-73
Local Support (Trust)	524	465	59
Regional Activities	35	40	5
Admin	40	40	0
<b>Total</b>	<b>880</b>	<b>880</b>	<b>0</b>
<b>Wayland</b>			
Maintenance	8	18	-10
HOV/E administration	0	0	0
Local Support	29	30	18
Regional Activities	15	17	-2
Admin	12	17	5
<b>Total</b>	<b>62</b>	<b>62</b>	<b>0</b>
<b>Weston</b>			
Maintenance	9	25	-16
Local Support (Town)	48	60	-17
Local Support (Trust)	258	180	38
Regional Activities	41	40	1
Admin	35	40	5
<b>Total</b>	<b>346</b>	<b>345</b>	<b>1</b>
<b>Totals</b>	<b>3314</b>	<b>3326</b>	<b>14</b>