



**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 20, 2019**

Applicant: Town of Concord

Co-Applicant (if applicable): \_\_\_\_\_

Project Name: Regional Housing Services Office program

Project Location/Address: 141 Keyes Road in Concord and 37 Knox Trail in Acton

Purpose: (Select all that apply)

Open Space       Community Housing       Historic Preservation       Recreation

Project Budget:

Amount of CPA Funds Requested:      \$ 20,000

Amount from Other Funding Sources:      \$ 20,000

Total Project Budget:      \$ 40,000

(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<br>(if appropriate)                                |
| <input checked="" type="checkbox"/> Narrative *                             | <input type="checkbox"/> Copy of Audit or most recent Financial<br>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 type="checkbox"/> Feasibility Assessment                             |  |
| <input type="checkbox"/> Statement of Sustainability (if applicable)        |  |

\* Required Documentation

The Contact Person for this Project is: Marcia Rasmussen, Director of Planning & Land Management

All Correspondence should be mailed to: DPLM, 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

Signature of Applicant: Marcia Rasmussen

Signature of Property Owner (if different): \_\_\_\_\_

**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 \$20,000 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 eight communities including Acton, Bedford, Lexington, Lincoln, Sudbury, Wayland and Weston. The RHSO provides professional staff support to all eight 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 ninth 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 721 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 10.52%.
- 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 the construction of four new units at the Peter Bulkeley Terrace building,

which reduced the funds needed from the Community Preservation Act. The RHSO is currently working on the 5Year HOME Consolidated Plan and securing HOME funds for the Junction Village project.

- 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, as well as the CHDC effort at 930 Main Street, a partner initiative with Habitat for Humanity.
- 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 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 \$40,000 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 \$20,000, 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 –FY2019 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 \$20,000 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 \$40,000. The expense of running the RHSO is shared between the 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) as well as the need for local support. Concord's membership fee represents approximately 15% of the RHSO's time which comes to \$39,214 in FY20. 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 on an indefinite basis, as agreed to by the member communities. The current office location at 37 Knox Trail is convenient to the staff and member 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

Address: 37 Knox Trail, Acton, MA 01720

Website: [WWW.RHSOhousing.org](http://WWW.RHSOhousing.org)

Email: [INFO@RHSOhousing.org](mailto:INFO@RHSOhousing.org)

Phone: (978) 287-1092

July 30, 2019

To: John Mangiaratti, Sarah Stanton, Kate Hodges, James Malloy, Melissa Murphy-Rodrigues, Louise Miller, Leon Gaumont, Roland Bartl, Nancy Tavernier, Kristen Guichard, Robert Hummel, Michael Rosen, Marcia Rasmussen, Lee Smith, Jerry Evans, Carol Kowalski, Adam Duchesneau, Patricia Brown, Cynthia Howe, Elizabeth Doucette, Sarkis Sarkisian, Imaikalani Aiu, Sarah Rhatigan

CC: Jody Kablack, Lara Plaskon, Liz Valenta

From: Elizabeth Rust

RE: Regional Housing Services Office – FY19 Q4 Status Report

This is the status report for activity from 4/1/2019 through 6/30/19 (FY19 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:**

Fiscal year FY19 has ended, the eighth full fiscal year of operation.

As part of closing the fiscal year, any true-up of FY19 hours is completed, where communities may purchase additional hours (Sudbury and Weston), or refunds are made (Bedford and Burlington), in some cases applying the amounts towards the FY20 invoices. The final hours recap is included at the end of the report.



The RHSO, like any organization, has transitions. Burlington has withdrawn, and Lincoln is planning to join mid-year, perhaps in the next quarter. On the staff side, Dan Gaulin has retired and Jody Kablack has started. Jody comes to the RHSO from many years of planning experience in Sudbury, and will bring new depth to our services.

The FY20 IMA Amendment was distributed and has been signed by all communities, with the RHSO making brief presentations at four Select Board meetings.

### **Regional Activities:**

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

The RHSO Leadership, comprised of Town Managers and Administrators, met in May for the annual program review. The Advisory Committee met in June to approve Lincoln joining and to discuss the Community Waitlist Program.

The RHSO presented the regional housing model at the June 2019 Housing Institute sponsored by MassHousing Partnership and there continues to be strong interest across the state on replicating this model in some fashion.



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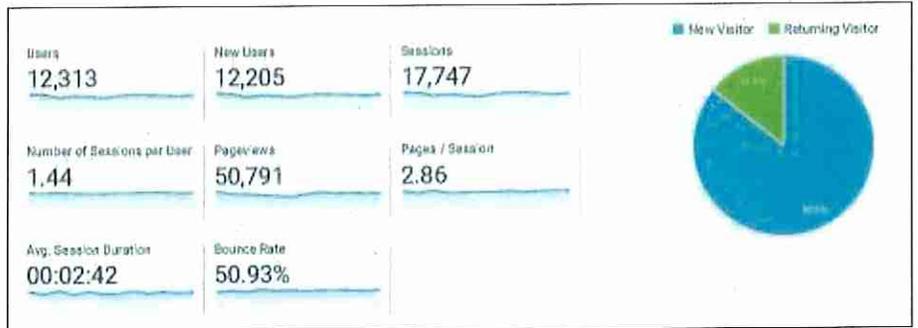
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The website - [RHSOhousing.org](http://RHSOhousing.org) – continues to be a helpful and useful resource, annual statistics to the right.

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. We have some enhancements planned for FY20, and welcome any ideas from the RHSO client community.



We continue to explore offering a RHSO Community Waitlist Program, and plan to present the project for approval to the Advisory Committee in October.

We have drafted the RHSO FY20 workplan, and included homeowner training for Q4 as well as other shared items.

## SHI and Inventory Administration

Managing the SHI inventory is a key component of the RHSO services provided. A total of 1053 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO.

We have continued to work closely with Acton, Sudbury and Wayland to estimate and project the SHI over the next 2, 5 and 10 years.

As 2020 approaches, communities are encouraged to review the annual Housing Unit Review Summary report from UMass Donahue distributed in October. This report shows what information is being aggregated into the Census, and is the place where tear downs can adequately be reported. It previews the 2020 SHI denominator.

	SHI Units	Housing Units	% Subsidized	+/- 10%	FY19 SHI Change	FY19 SHI Changes	FY20+ Pipeline
Acton	571	8,475	6.74%	-277	3	Prospect st (1), Main St (2)	327 Units: Powder Mill (230), PO Crossing (3), Mass Ave (-1), Avalon (86), School St (2)
Bedford	974	5,322	18.30%	442			13 Units: Evergreen (3), Village at Bedford Woods (6), Pine Hill (4)
Burlington	1,283	9,627	13.33%	320	2	Simonds Park (2)	
Concord	721	6,852	10.52%	36			88 Units: Junction Village (83), Black Birch II (2 non-SHI), Gerow (1), 930 Main St (2)
Lexington	1,327	11,946	11.11%	132	-1	Manor House (6), DMH (-7),	4 Units: Wright Farm (1), Jefferson Drive (3)



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Sudbury	664	5,921	11.21%	72			
Wayland	317	4,957	6.39%	-179	63	Covered Bridge (3), Cascade (60)	14 Units: 11 Hammond (1), Michael Road (1), Windsor Place (12)
Weston	151	3,952	3.82%	-244	-16	Village at Silver Hill (-2), Kendal Village (-16), Warren Ave (2)	530 Units??: 104 BPR (150?), Mill Creek/Moderna (180), South Av (200?)
total	6,008	57,052	10.53%	303	51		

## 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.

**Ownership Units:** For the deed restricted ownership units, the annual monitoring review consists of:

- Review the registry of deeds for any activity.
  - Complete
- Review owner mailing address versus town database.
  - Complete
- Self-certifications to each owner, 3 mailings
  - Complete
- Review on-line sites for rentals
  - Complete
- Provide annual certification reports to DHCD
  - Complete
- Provide Welcome Letters to new owners
  - Quarterly: Sent 2 in May (Acton, Bedford)

6/30/2019	FY19 Self-Declaration			
	Sent	Rec'd	Open	% rec'd
Acton	59	56	3	95%
Bedford	54	50	4	93%
Burlington	24	21	3	88%
Concord	73	70	3	96%
Lexington	25	25	0	100%
Sudbury	36	35	1	97%
Wayland	36	33	3	92%
Weston	27	25	2	93%
<i>total</i>	<i>334</i>	<i>315</i>	<i>19</i>	<i>94%</i>

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%-96% response rate since FY14.

**Rental Projects:** The RHSO monitors Local Initiative Program (LIP) rental units on behalf on the member communities, as required by the DHCD Regulatory Agreement. There are 18 rental projects in the RHSO service area where the RHSO assists the Towns with their monitoring responsibility.

The full monitoring review includes:

1. Reviewing that the rents are calculated in accordance with the Regulatory Agreement.
2. Reviewing sample tenant files to ensure that tenant income is recertified using source documents according to the regulations
3. Verifying that tenants are selected in accordance with Fair Housing requirements and current Affirmative Fair Housing Marketing Plans (AFHMP) including advertising requirements.
4. Verification that the units are maintained in accordance with applicable standards.
5. Providing Town certification to DHCD, as required.
6. Follow-up during the year on compliance findings and recommendations.
7. Annual rent increase review and approval recommendation.



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	Town	Rental Development Name	SHI units	Subsidy Program	FY19 Status
1	Acton	Scattered sites (AHA)	8	LIP 40B	FY19, FY21
2	Acton	Inn at Robbins Brook	3	LIP-LAU	Final Review
3	Bedford	Village at Concord Road	12	LIP 40B	Complete
4	Bedford	Patriot Place	10	LIP 40B	Delayed
5	Bedford	Village at Taylor Pond	200	LIP-LAU	Complete
6	Concord	Concord Mews	350	LIP 40B	Complete
7	Concord	Concord Park	16	Local	Complete
8	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	FY18, FY20
9	Concord	Brookside Square	8	LIP-LAU	FY20
10	Concord	Warner Woods	80	MH NEF	Complete
11	Lexington	Avalon at Lexington Hills	97	LIP 40B	Complete
12	Lexington	Avalon Lexington	56	Local	Complete
13	Lexington	LexHAB Scattered Sites	48	various	Complete
14	Sudbury	Willis Lake (SHA)	1	LIP-LAU	FY18, FY20
15	Sudbury	Avalon	250	LIP 40B	Complete, Full review FY20
16	Wayland	Residences At Wayland Center	12	LIP-LAU	Complete
17	Weston	Church, Jones, Pine, Viles	6	LIP LAU	Complete
18	Weston	Warren Ave	5	LIP 40B	Complete
			1166		

## 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 with two more affordable unit closings, reviewing three requests for capital improvements, and recommending approval for another buyer, supported the sale of the foreclosure unit and release of the restriction, started marketing a resale unit in Acton, reviewed Inn at Robbins ownership transfer, explored impact of income limit increases on rents at Old High School,

In Bedford: Recommended 2019 rent approvals for Village at Taylor Pond and Village at Concord Road, recommended support for increased Income Averaging LIHTC units at Bedford Village, continued corresponding with owner of Patriot Place with escalation, confirmed the status of the Bedford Housing Trust note to the Bedford Veterans Quarters,

In Burlington: Recommended 2019 rent approvals for The Reserve.

In Concord: Recommended 2019 rent approvals for Concord Mews, Continued to work with condominium on potential mediation, completed an Affirmative Fair Housing and Marketing Plan for the CHA in anticipation of an upcoming vacancy, started marketing a resale unit in Concord .

In Lexington: Completed assistance to LexHAB for cost certification for Fairview, assisted LexHAB with 2019 annual report and rent approvals as well as the compliance process for their moderate income ownership unit.



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In Sudbury: Recommended 2019 rent approvals for Avalon, assisted the Town with getting the Avalon monitoring fee paid, calculated resale price for restricted owner at Carriage Lane.

In Wayland: Supported the town's efforts for cost certification review for Wayland Commons and Wayland Gardens.

In Weston: Completed the resale unit at Highland Meadows with a June closing, recommended approval for a refinancing at South Ave.

## 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 \$1,670,000 since FY13.

In this reporting period the RHSO assisted with approvals, and submission of the new annual Sub-recipient Agreements, requisitioned HOME admin funds, and attended the quarterly HOME meeting in May, as well as:

- Consolidated Plan: The HOME 5 Year FY21-FY25 Consolidated Plan provides a strategic look at the community's need and targets HOME projects to address that need. Annual plans then map to the 5-year goals set out. Newton has laid out a segmented approach to the effort, with the below steps and deliverables. The RHSO will work with each community, and leverage materials and data as applicable.
  - Citizen Participation Plan – Prepared initial materials in preparation for the August deliverable.
  - Needs Assessment/Market Analysis – September/October
  - Strategic Plan – November
  - FY21 Annual Action Plan - January
- Bedford: Continued work on Bedford Housing Authority Ashby place project amendment to include additional roofing work, adding additional funds unused FY19 HOME funds to the project (~\$19k), provided HOME utility schedule to 447 Concord Road, .
- Concord: No project activity this period.
- Lexington: Completed the initial commitment process for Pine Grove, and will work towards adding the FY20 funds to the project.
- Sudbury: Supported the closing for The Coolidge Phase II HOME award for \$178,203.
- Wayland: Continued discussions on implementing a Tenant Based Rental Assistance Program (TBRA) using HOME funds.

## 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: Continued monthly meetings with town and followed up as needed.

Bedford: Provided the assessors with 2019 restricted values, assisted the town and developer with the Regulatory Agreement for Pine Hill Crossing.

Burlington: Provided information on municipal affordable housing trusts.



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Concord: Provided the assessors with 2019 restricted values, supported related activities for Town Meeting articles, supported recruiting to CHDC and new housing trust task force, received unfortunate news that Junction Village did not get state funding awards this year, continued analysis on new project to provide an enhanced housing inventory, assisted the CHDC by preparing agendas, packets and minutes, administering the Small Grant Program, obtained new Directors and Officer's insurance policy, and prepared to purchase the property at 930 Main Street working with Habitat, CPC/Town, and the Concord Housing Foundation.

Lexington: Calculated the 2019 restricted values for the assessors, provided comments on the permit for 186 Bedford Street, suggestions for restricted moderate income unit standards, and updated the Town and LexHAB on the next steps for Wright Farm 40B.

Sudbury: Calculated the 2019 restricted values for the assessors, for The Coolidge Phase 2, finalized the CPA Grant Agreement for use by the CPC, assisted with the complex closing, and completed payment for the Sudbury Housing Trust funds. For Grouse Hill, provided resale price calculations for four units, and closing documents for two units, reviewed applications and recommended approval for two applicants at Frost Farm. Supported the Sudbury Housing Trust by: preparing agendas, packets and attending monthly meetings, supporting the Home Preservation and Small Grant Program by approving invoices for awarded funds, and assisting with the repairs at one particular unit. In addition, the RHSO performed lottery and resale services for other entities in the region under the Sudbury Trust umbrella, as follows:

- o Completed LIP applications/marketing plans for Sherborn, Mansfield, Hopkinton
- o Started tenant recertifications for Plainville
- o Started marketing at Lexington Jefferson Drive and Villages at Sherborn
- o Supported closings for Bedford Evergreen Meadows, Harvard Trail Ridge.

Wayland: Calculated the 2019 restricted values for the assessors, continued definition of affordable housing timeline and process for River's Edge DHCD LIP process and SHI.

Weston: Provided the assessors with 2019 restricted values, presented a 40B primer during a public meeting information session on a proposed 40B development. Continued to work with the Elderly Housing Committee on adding the additional units at the Brook School Apartments to the SHI through the LIP/LAU application process. Assisted the Weston Affordable Housing Trust with its projects and programs, including: preparing meeting agendas and packets, implemented a second round of the Home Repair Grant (six applications were submitted), continued support for the Affordable Home Ownership Opportunity Fund through the development of a RFP to convey 0 Wellesley to a developer for affordable housing on the site; assisted in preparation of comment letters to selectman for two 40B proposals, and assisted in updating the rent policy for the Warren Avenue apartments.



# Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

## FY19 Tracking and FY20 RHSO Budget:

The FY19 final hours are shown below.

	YTD Actual	Annualized Budget	Difference
Acton	329.00	320.00	9.00
Bedford	451.50	445.00	6.50
Burlington	125.50	130.00	(4.50)
Concord	496.00	500.00	(4.00)
Lexington	394.50	390.00	4.50
Sudbury	874.50	880.00	(5.50)
Wayland	211.50	215.00	(3.50)
Weston	412.00	405.00	7.00
	3,294.50	3,285.00	9.50

The FY20 approved budget is shown below.

	RHSO FY20 - Approved Budget			
	Amount	Current Hours	% of Total	Comments
Starting Balance	\$0			
<b>Revenue</b>				
Acton	\$36,862	470	15%	Increased hours for (part of) HPP
Bedford	\$31,372	400	13%	Reduced hours for less support
Concord	\$39,214	500	16%	Same hours as FY19
Lexington	\$29,803	380	12%	Same fee as FY19
Sudbury	\$65,488	835	26%	Variable for lottery work
Wayland	\$15,294	195	6%	Fine tuned level of support
Weston	\$30,666	391	12%	Fine tuned level of support
<b>Total</b>	<b>\$248,698</b>	<b>3,171</b>	<b>100%</b>	
<b>Expenses</b>				
Staffing	\$219,698	\$69.28		
Program expenses	\$5,000			
One Time	\$2,000			
Administrative Cost	\$20,000			
<b>Total Expenses</b>	<b>\$246,698</b>			
Ending Balance	\$2,000			
Billing Rate	\$78.43			