



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, October 9, 2020

Applicant: Town of Concord

Co-Applicant (if applicable): _____

Project Name: Regional Housing Services Office

Project Location/Address: 141 Keyes Rd

Purpose: (Select all that apply)

- Open Space Community Housing Historic Preservation Recreation

Project Budget:

Amount of CPA Funds Requested: \$ 25,000

Amount from Other Funding Sources: \$ 25,000

Total Project Budget: \$ 50,000
(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 (Non Profit Organizations Only)* |
| <input 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

All Correspondence should be mailed to: 141 Keyes Rd. 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): [Signature]

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 \$25,000 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 nine communities including Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland and Weston. The RHSO provides professional staff support to all nine 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 and require monitoring to ensure the administrative and regulatory requirements involved in maintaining their affordability are considered. As Concord's affordable housing inventory has grown, so too 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 support to Concord and eight 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, through the Inter-municipal Agreement signed by all participating communities.

The RHSO meets the Community Housing needs of its member communities by providing expert staff and administrative services:

- 1) Monitoring - RHSO staff monitors 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. 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. This past year the RHSO staff worked 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 in purchasing 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/) 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.

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 \$50,000 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 \$25,000, 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 –FY2020 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 2020 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 former 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 \$25,000 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 \$50,000. 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. The remaining funds in this account will be used for any "a la carte" services of the program required by the Town (such as additional support that may be required as the Housing Production Plan moves forward).

Feasibility

An Inter-Municipal Agreement between Concord and the other member communities was signed in March 2011 and renewed in 2017 (and extended in 2020 due to the Corona-19 pandemic). 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, Concord, Lexington, Lincoln, Sudbury, Wayland, and Weston

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

July 31, 2020

To: John Mangiaratti, Sarah Stanton, Stephen Crane, James Malloy, Timothy Higgins, Henry Hayes, Louise Miller, Leon Gaumond, Roland Bartl, Nancy Tavernier, Kristen Guichard, Robert Hummel, Alyssa Sandoval, Marcia Rasmussen, Heather Gill, Lee Smith, Jerry Evans, Carol Kowalski, Amanda Loomis, Jennifer Burney, Paula Vaughn, Adam Duchesneau, Patricia Brown, Cynthia Howe, Sarkis Sarkisian, Imai Aiu, Sarah Rhatigan

CC: Jody Kablack, Lara Plaskon, Liz Valenta

From: Elizabeth Rust

RE: Regional Housing Services Office – FY20 Q4, Status Report

This is the year-end FY20 status report for activity from 4/1/20 through 6/30/20 (FY20 Q4) for Regional Housing Services Office, the inter-municipal collaboration between the eight towns of Acton, Bedford, Concord, Lexington, Lincoln, Sudbury, Wayland and Weston. Please let me know if you have any comments or questions.

RHSO Administration:

This year ended as we settled uneasily into the pandemic shift in all operations, we recognize all too well how our life, and the lives of those we serve, has changed. I know we speak for all residents to thank the municipal leaders for their thoughtful and quick action in crisis response and management.

The work of the RHSO has continued in a shut-down operation, with the staff working remotely, occasionally from the office, and meeting through ZOOM. Efforts on the workplan continue, with adjustments as needed. The RHSO COVID response activities are included in the following section.

This year completed the third three-year RHSO IMA term ending 6/30/20, and the towns have all signed a 90-day extension to end 9/30/20, when we can presumably meet and resume approvals in the standard manner. Invoices will be sent to municipalities as funds are appropriated. The IMA for the full three-year term will be circulated, presented and executed in the first quarter of FY21. From the staffing perspective, the RFP for the RHSO Consultants was finalized and published, and we look forward to the awards.

Maynard is officially joining the RHSO, effective 7/1/20, and we welcome our neighboring municipality. Maynard is the 9th community, which is the limit specified in the IMA.

The Advisory committee met in May (via ZOOM), and reviewed rental vouchers and vacancies, rental assistance programs, increased resale activity as well as a general community exchange. The Advisory committee will meet again in August.

Regional Activities:

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





Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

We presented and co-sponsored at the CHAPA Metrowest Regional Meeting, held via ZOOM with over 100 participants.

The RHSO is responding to COVID-19 in this fluid and changing environment.

- The RHSO implemented an Emergency Rental Assistance Program (ERAP) with guidance from Massachusetts Housing Partnership (MHP) and CHAPA. This has been rolled out in Acton and Sudbury, with Maynard coming in August. Plans and discussions are underway for Bedford and Weston to participate. and in partnership with interested RHSO member communities to provide short-term rental assistance for COVID-related decreases in income for possible Q4 initial implementation, including participation in a few state-level conference meetings.
- The RHSO website has a section on housing resources and referrals, including information on the state-funded RAFT and ERMA programs which provides temporary assistance to low-income tenants and homeowners;
- The RHSO is working with DHCD and the property managers of larger rental developments to reiterate the state guidance on moratorium on evictions and rent increases;
- The RHSO prepared buyer and seller agreements to use in resales outlining special considerations for showings and inspections during the COVID precautionary period;
- The RHSO sent letters via USPS to all ~380 owners of deed-restricted properties with information on COVID resources.

Our website service migrated to a new platform, and we supported their migration in our hosting services domain. We continue to update the website with new units and properties as created, and new owners for units that have been resold, and new opportunities for existing and future residents.

SHI, 40B Safe Harbor and Inventory Administration

Managing the SHI inventory is a key component of the RHSO services provided. A total of 894 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO, and 91 in FY20.

	SHI Tracking				FY20 Activity		40B Safe Harbor	
	Housing Units, 2010 Census	True SHI Units (6/30/20)	% Subsidized	+/- 10%	FY20 SHI %	SHI Units FY20		FY20 Completed Activity
Acton	8,475	657	7.75%	592	7.75%	89	Avalon (86), Mass Ave (-1), School St (2), PO Crossing (1), 146 Prospect (1)	Yes - HPP Certified, 7/18/21
Bedford	5,322	981	18.43%	883	18.43%	7	Evergreen (3), Pine Hill (4)	Yes - >10%
Concord	6,852	721	10.52%	649	10.52%	0	Black Birch II (2 non-SHI)	Yes - >10%
Lexington	11,946	1,334	11.17%	1201	11.17%	7	DDS (4), Jefferson Drive (3)	Yes - >10%
Lincoln	2,130	268	12.58%	239	12.58%	-30	Oriel Landing (-30 lapsed)	Yes - >10%
Sudbury	5,921	669	11.30%	603	11.30%	5	DDS (5)	Yes - >10%
Wayland	4,957	270	5.45%	237	5.45%	13	11 Hammond (1), Windsor Place (12), Cascade (-60 lapsed)	
Weston	3,952	151	3.82%	136	3.82%	0		
total	49,555	5,051	10.19%	4537	10.19%	91		



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

Monitoring:

The monitoring program is a core service of the RHSO with over 5,000 units of rental and ownership restricted housing across the communities.

The 2020 Income Limits were released by HUD on April 1, 2020, representing a 5% increase in the overall Area Median Income (AMI) overall, and an 8% increase in the AMI used in subsidized housing programs.

Ownership Units: The ownership monitoring is complete for FY20, with the following steps:

- Review the registry of deeds for any activity.
- Review owner mailing address versus town database.
- Self-certifications to each owner, 3 mailings
- Review on-line sites for rentals
- Provide annual certification reports to DHCD, awaiting one community.
- Sent quarterly Welcome Letters to new owners in Bedford and Lexington.

7/9/2020	FY20 Self-Declaration				FY19	
	Sent	Rec'd	Open	% rec'd	% rec'd	
Acton	61	58	3	95%	95%	
Bedford	57	52	5	91%	93%	
Concord	72	70	2	97%	96%	
Lexington	30	30	0	100%	100%	
Lincoln	58	49	9	84%	n/a	
Sudbury	36	34	2	94%	97%	
Wayland	38	34	4	89%	92%	
Weston	26	23	3	88%	93%	
<i>total</i>	<i>378</i>	<i>350</i>	<i>28</i>	<i>93%</i>	<i>94%</i>	

Resales: One of the primary responsibilities of the monitoring agent is to locate eligible buyers upon resale of deed restricted ownership units. This falls to the municipality for units in the LIP Program, 40B units where the town is the named agent, or other local initiatives. FY20 saw an uptick in resales, and this trend is continuing strongly into FY21. The RHSO provides these resale services as part of its core monitoring efforts, and the town receives the resale fee (~\$4k -~\$5k) associated with the transaction.

In FY20, 6 units were resold in Acton, Concord (2 units), Lexington, Lincoln and Sudbury. There were 4 additional units that closed in FY21 this July (Acton, Concord, Lincoln, Weston), with another 4 units currently in marketing (Bedford, Lincoln (2), Sudbury). Municipalities can, and have, purchase additional hours if the resales extend past the contracted support level.

Rental Projects: The RHSO monitors Local Initiative Program (LIP) rental units and units funded with HOME funds on behalf on the member communities, as required by the funding Regulatory Agreements. This quarter we worked on a checklist to facilitate our review of rental vacancy leasing – marketing and waiting lists management as well as responding to monitoring issues due to COVID, such as rent increases, recertification delays, and tenant inquiries.

In general, the 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.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org
Email: INFO@RHSOhousing.org
Phone: (978) 287-1092

7. Reviewing annual rent increase requests and recommending approvals.

The below table provides the detail schedule for the rental monitoring. There is some shift in schedule and scope due to COVID, including desk reviews in lieu of site visits. We plan to focus on a more thorough review of marketing and waiting list management. There is a moratorium of both rent increases and evictions, per DHCD guidance and rental recertifications are slower and delayed.

	Town	LIP Rental Development Name	SHI units	Subsidy Program	FY20 Status
1	Acton	Scattered sites (AHA)	8	LIP 40B	FY21
2	Acton	Inn at Robbins Brook	3	LIP-LAU	FY21
3	Bedford	Village at Concord Road	12	LIP 40B	FY21
4	Bedford	20 Railroad	4	HOME	In Process
5	Bedford	Patriot Place	10	LIP 40B	Completed
6	Bedford	Village at Taylor Pond	200	LIP-LAU	Completed
7	Bedford	447 Concord Road	1	HOME	Completed
8	Concord	Concord Mews	350	LIP 40B	Completed
9	Concord	Concord Park	16	Local	
10	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	FY21
11	Concord	Brookside Square	8	LIP-LAU	Completed
12	Concord	Warner Woods	80	MH NEF	FY21
13	Concord	Thoreau St (CHA)	1	HOME	Completed
14	Concord	Peter Bulkeley (CHA)	4	HOME	Completed
15	Lexington	Avalon at Lexington Hills	97	LIP 40B	Completed
16	Lexington	Avalon Lexington	56	Local	Completed
17	Lexington	LexHAB Scattered Sites	48	various	In Process
18	Lexington	Pine Grove Village	3	HOME	In Process
19	Lexington	Keeler Farm	1	HOME	In Process
20	Lincoln	Commons	30	LIP 40B	Completed
21	Sudbury	Willis Lake (SHA)	1	LIP-LAU	FY21
22	Sudbury	Avalon	250	LIP 40B	Completed
23	Sudbury	Coolidge (Phase1)	1	HOME	In Process
24	Wayland	Residences At Wayland Center	12	LIP-LAU	Completed
25	Weston	Church, Jones, Pine, Viles	6	LIP LAU	In Process
26	Weston	Warren Ave	5	LIP 40B	In Process
27	Weston	Merriam Village	5	LIP LAU	In Process
			1216		

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 by assisting with solar panel installation, condo complaints, and attending a ZOOM lottery for the last unit and then reviewing and recommending approval for the buyer. Marketed and located an eligible purchaser for the resale of two units – Parker St and Lalli Terrace, and worked with the Town on reviewing the restrictions at Brewster Lane and recommending approval for the buyer.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

In Bedford: Marketed and located an eligible purchaser for the resale of a unit at Hartwell Farms, added the 4 units at Pine Hill Crossing to the SHI, recommended approval for a refinancing at a unit at Bedford Meadows, confirmed the Town loans for accountants at 447 Concord Road.

In Concord: Marketed and located an eligible purchaser at Walden Street, and supported the closing for the resale of a different unit at Walden Street, for the Concord Housing HUD Repositioning project - completed the Environmental Review reports and assisted with the Town support letter.

In Lexington: Marketed, located an eligible purchaser, and prepared the closing documents for the resale of a unit at Pine Grove Village, added the 3 units at Jefferson Drive to the SHI.

In Lincoln: Supported closings at Minuteman Commons and Cambridge Turnpike, worked with the Town and two owners at Battle Road Farm on selling their units, and started marketing 2A, reviewed and categorized all the individual deed riders at Battle Road Farm finding 4 distinct models.

In Sudbury: Started marketing a resale at Pinewood, worked with the parties on the offered unit at Eddy St, kept apprised on the Dutton Road unit, recommended approval for an applicant to the Frost Farm waiting list, updated the Frost Farm eligibility requirements for 2020, and completed a Maximum Resale Price calculation at Grouse Hill.

In Wayland: No monitoring activities this period.

In Weston: Marketed and located an eligible purchaser, and supported the closing for the resale of a unit at Highland Meadows.

HOME Support:

The HOME support category assists 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 ~\$2,310,000 since FY13.

In this reporting period the RHSO requisitioned all the HOME admin funds, attended the quarterly HOME meeting in May, participated in the Consortium review of possible HUD COVID related waivers, 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. This period completed this year-long effort, responding to questions and comments on final materials.
- Analysis of Impediments: Supported focus groups for each community and preliminary report materials.
- Bedford: Completed HOME monitoring for 447 Concord Road; submitted requisition for the Bedford Housing Authority Ashby Place project. Work for Phase II is scheduled for Q1 FY21.
- Concord: No additional activity this period, planning to start environmental review and then funding commitment for Junction Village as project has received DHCD funding award.
- Lexington: Submitted requisition for the Lexington Housing Authority Pine Grove Village project. Work is scheduled for completion in Q1 FY21.
- Sudbury: Awaiting leasing for completion of Coolidge II HOME project with the final requisition. Construction and occupancy is for Q2 FY21.
- Wayland: Supported the Wayland Tenant Based Rental Assistance Program (TBRA), to-date awarding \$5,416 across three tenant cases.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

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; provided comments on the Grandview ZBA application; completed the Housing Production Plan and obtained DHCD approval including incorporation of many comments through public review session. Rolled out the ERAP Program with an initial lottery, approval of 10 applicants by 6/30, and submission of payments for July rent. Supported the ACHC by updating the Capital Improvement Program with 2020 eligibility. Started analysis on the assessment values for the deed restricted ownership properties.

Bedford: Reviewed Plank Street proposal and sent letter to developer regarding timing of affordable housing component, supported the ACHC Capital Improvement Program by updating the application with 2020 eligibility, and started analysis on the assessment values for the deed restricted ownership properties.

Concord: Provided input to the CPC annual plan update. Supported the town and CHDC with the Junction Village development by preparing materials and information in advance of Town Meeting. Assisted the CHDC by investigating accounting services, administering the Small Grant Program including updating the application with 2020 eligibility and processing invoices for awarded funds. Started analysis on the assessment values for the deed restricted ownership properties.

Lexington: Assisted with final Moderate Income standards, prepared a Local Preference Justification for 186 Bedford Street, and started analysis on the assessment values for the deed restricted ownership properties.

Lincoln: Started analysis on the assessment values for the deed restricted ownership properties.

Sudbury: Assisted with Housing Choice returning community application, Started analysis on the assessment values for the deed restricted ownership properties. Supported the Sudbury Housing Trust by: preparing agendas, packets and attending meetings; and Small Grant Program by updating the application with 2020 eligibility, reviewing and presenting applications for consideration and award, and processing invoices for awarded funds. In addition, under the Sudbury Trust umbrella, the RHSO responded to a MassHousing RFP for Monitoring Agent services and performed lottery and resale services for other entities in the region, as follows:

- No new contracts this period
- Started and/or Completed Affirmative Fair Housing Marketing Plans for Harvard Pine Hill Village and Medford Wellington Woods
- Supported marketing efforts at Reading Postmark Square, Harvard Pine Hill Village, Medford Wellington Woods
- Completed tenant re-certifications for
- Qualified applicants and held the lottery at,
- Supported closings for Bedford Pine Hill Crossing, Concord Black Birch, Lexington Ridge, Sherborn Fields at Sherborn Falls,

Wayland: Started analysis on the assessment values for the deed restricted ownership properties.

Weston: Continued to work with the town on a proposal with to assist with the Housing Production Plan, specifically the Needs Assessment portion. Assisted the Trust and the Elderly Housing Committee (EHC) on



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

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; plans to develop the Housing Production Plan and ongoing asset management of Warren Avenue housing development; and continued support the development at 0 Wellesley through finalizing the RFP and assisting with its publication. Additionally, assisted the Trust in requesting CPA funding for Emergency Rental Assistance. Started analysis on the assessment values for the deed restricted ownership properties.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

FY20 Tracking:

The FY20 final hours are shown in the table.

These include FY20 supplemental hours purchase by Acton, Concord, Lincoln and Sudbury over the year.

Weston has rolled over 23 hours to FY21.

	FY20 Actual	FY20 Budget	Actual v Budget
Acton			
Monitoring	95.00	106.00	(11.00)
40B Monitoring	28.50	40.00	(11.50)
HPP	268.00	265.00	3.00
Local Support	118.50	100.00	18.50
Regional Activities	26.00	25.00	1.00
Admin	39.25	30.00	9.25
Total	575.25	566.00	9.25
Bedford			
Monitoring	149.50	80.00	69.50
HOME administration	76.50	75.00	1.50
Local Support	113.00	190.00	(77.00)
Regional Activities	26.00	25.00	1.00
Admin	39.25	30.00	9.25
Total	404.25	400.00	4.25
Concord			
Monitoring	168.25	80.00	88.25
HOME administration	69.00	75.00	(6.00)
Local Support (Town)	193.75	208.00	(14.25)
Local Support (CHDC)	123.50	200.00	(76.50)
Regional Activities	26.00	25.00	1.00
Admin	39.25	30.00	9.25
Total	619.75	618.00	1.75
Lexington			
Monitoring	101.00	125.00	(24.00)
HOME administration	67.00	75.00	(8.00)
Local Support	141.75	125.00	16.75
Regional Activities	26.00	25.00	1.00
Admin	38.75	30.00	8.75
Total	374.50	380.00	(5.50)
Lincoln (start 9/1)			
Monitoring	106.50	103.00	3.50
Local Support	61.25	50.00	11.25
Regional Activities	22.50	25.00	(2.50)
Admin	23.75	30.00	(6.25)
Total	214.00	208.00	6.00
Sudbury			
Monitoring	77.25	80.00	(2.75)
HOME administration	33.00	75.00	(42.00)
Local Support (Town)	81.75	200.00	(118.25)
Local Support (Trust)	675.00	525.00	150.00
Regional Activities	26.00	25.00	1.00
Admin	39.25	30.00	9.25
Total	932.25	935.00	(2.75)
Wayland			
Monitoring	22.25	40.00	(17.75)
HOME administration	51.25	50.00	1.25
Local Support	59.25	50.00	9.25
Regional Activities	26.00	25.00	1.00
Admin	39.25	30.00	9.25
Total	198.00	195.00	3.00
Weston			
Monitoring	48.00	40.00	8.00
Local Support (Town)	87.75	92.00	(4.25)
Local Support (Trust)	166.50	204.00	(37.50)
Regional Activities	26.00	25.00	1.00
Admin	39.25	30.00	9.25
Total	367.50	391.00	(23.50)
Totals	3685.50	3693.00	(7.50)