



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 17, 2021

Applicant: Town of Concord

Co-Applicant (if applicable): _____

Project Name: Regional Housing Services Office

Project Location/Address: 141 Keyes Rd. / misc. sites around Concord

Purpose: (Select all that apply)

- Open Space Community Housing Historic Preservation Recreation

Project Budget:

Amount of CPA Funds Requested: \$ 28,000

Amount from Other Funding Sources: \$ 28,000

Total Project Budget: \$ 56,000

(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): _____

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 \$28,000 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 tenth 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) Resales of existing affordable housing units – Concord and other communities have observed an increase in the number of homeowners interested in selling their affordable units, which has led to the need for additional outreach and support services to these homeowners.
- 6) Regional Activities Support – Three years ago, the RHSO launched its 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 \$56,000 for the program, a modest increase over last year. 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 \$28,000, 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 –FY2021 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 2021 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 nine 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 \$28,000 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 \$56,000. 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 2021 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, Maynard, 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, 2021

To: John Mangiaratti, Sarah Stanton, Stephen Crane, James Malloy, Timothy Higgins, Greg Johnson, Henry Hayes, Louise Miller, Leon Gaumond, Janet Adachi, Kristen Guichard, Robert Hummel, Alyssa Sandoval, Marcia Rasmussen, Heather Gill, Lee Smith, Carol Kowalski, Amanda Loomis, Paula Vaughn, Megan Zammuto, Adam Duchesneau, Cynthia Howe, Sarkis Sarkisian, Imai Aiu, Sarah Rhatigan

CC: Jody Kablack, Lara Plaskon, Liz Valenta

From: Elizabeth Rust

RE: Regional Housing Services Office – FY21 Q3, Status Report

This is the FY21 status report for activity from 4/1/21 through 6/30/21 (FY21 Q4) for Regional Housing Services Office, the inter-municipal collaboration between the nine towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland and Weston. Please let me know if you have any comments or questions.

RHSO Administration:

We resumed the annual municipal leadership meeting, and met in person with the town managers and administrators to recap the RHSO program year, and plans for FY22. The leadership agreed to continue the practice of executing an annual IMA Amendment and having it reviewed and voted by each Select Board, and signed by each member community. This keeps the RHSO on the agenda of municipal leadership annually, to retain support and awareness. We attended Select Board meetings in Acton, Concord, Maynard and Sudbury to assist in the approvals.



In FY21, we delivered an additional 20% in supplemental services, receiving additional funding for those services. This necessitated an increase in the RHSO Revolving Fund expense limit.

Looking forward to FY22, we are starting the recruiting to hire a 5th RHSO staff, which was deferred for this fiscal year due to on boarding difficulties in COVID times.

The Advisory committee met in June and reviewed Fair Housing plans for FY22 and community exchange.

Regional Activities:

Regional activities provide general housing resources, including trainings, reports, information and the website.

We held a homeowner information session, covering the particulars of the deed restriction, capital improvements, living in a condo and refinancing/resale procedures. We invited 428 owners, and 75 attended – 18% - higher than in past years probably due to the convenience of zoom.

For FY22, we plan to have another homeowner session; a session aimed at owners in small self-managed condominium developments, training in April for Fair Housing month, and a roundtable for the social workers.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

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

With the new Census data coming out this coming fall, we are planning to create new one-page Infographic sheets for each member community, with simple to read graphs and charts hitting the high points in the new demographic and housing data available. We'll work with the Advisory Committee on a standard format.

The RHSO model continues to attract interest from other communities, and we spoke at the Cape Cod Housing Institute on the benefits for regional housing administration – including proactive monitoring, resource efficiency though access to shared technical resources, and regional support. We were also a panelist on the CHAPA Metrowest Regional Meeting.

The RHSO is winding down the Emergency Rental and Mortgage Assistance Programs with the increased state and federal funds available.

Rental Assistance completed FY21			Mortgage Assistance completed FY21				
	AMOUNT ALLOCATED	HOUSEHOLDS ASSISTED	AMOUNT COMMITTED		AMOUNT ALLOCATED	HOUSEHOLDS ASSISTED	AMOUNT COMMITTED
Acton	\$100,000	47	\$83,900	Acton	\$60,000	10	\$23,012
Bedford	\$60,000	11	\$38,450	Maynard	\$50,000	5	\$14,089
Maynard	\$70,000	16	\$53,450				
Sudbury	\$60,000	8	\$64,650				
Weston	\$100,000	6	\$38,900				
TOTAL	\$390,000	88	\$279,350	TOTAL	\$110,000	15	\$37,101

SHI, 40B Safe Harbor and Inventory Administration

For the first time since the inception of the RHSO, all communities are in 40B Safe Harbor! Though delays in building permits and the coming 2020 Census will likely change the 40B Safe Harbor status for a number of communities.

Managing the SHI inventory is a key component of the RHSO services provided. A total of 1,430 units have been added to the Subsidized Housing Inventory for the members since joining the RHSO and 665 in FY21 alone.

	Housing Units, 2010	Published SHI	SHI%	+/- 10%	FY21 adds	FY22 Pipeline	40B Safe Harbor
Acton	8,475	896	10.57%	49	239	Craftsman Village (2), Mass Ave (31)	>10%, HPP Certified
Bedford	5,322	981	18.43%	449	0	Village at Bedford Woods (6)	>10%
Concord	6,852	721	10.52%	36	0	Riverbend (1), Junction Village (83), Gerow (2), 930 Main St (2)	>10%
Lexington	11,946	1,335	11.18%	141	4	186 Bedford St (13), Waterstone Lexington (21)	>10%
Lincoln	2,130	298	13.99%	85	0		>10%
Maynard	4,430	419	9.46%	-24	24	Coolidge (12), Old Bay Road (1)	HPP Certified
Sudbury	5,921	669	11.30%	77	0	Cold Brook Crossing (26)	>10%
Wayland	4,957	548	11.06%	53	218		HPP Certified
Weston	3,952	331	8.38%	-65	180		HPP Certified
total	53,985	6,198	11.48%	800	665		



Regional Housing Services Office

Serving Acton, Bedford, Concord, Lexington, Lincoln, Maynard, 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 almost 6,000 units of SHI rental and ownership restricted housing across the communities, of those, the RHSO monitors 388 ownership units, and 838 rental units.

This quarter we sent referral letters to 12 homeowners behind on payments.

Ownership Units: The ownership monitoring is finishing up for FY21, with the following steps:

- Self-certifications to each owner, 93% response rate (same as FY20)
- Review the registry of deeds, complete
- Review owner mailing address versus town database, complete
- Review on-line sites for rentals, on-going
- Provide annual certification reports to DHCD, 8 of 9 communities complete (awaiting Wayland)
- Send quarterly Welcome Letters to new owners – 20 letters to date.

6/30/2021	FY21 Self-Declaration			
	Sent	Rec'd	Open	% rec'd
Acton	67	61	6	91%
Bedford	59	55	4	93%
Concord	73	71	2	97%
Lexington	32	32	0	100%
Lincoln	54	48	6	89%
Maynard	6	6	0	100%
Sudbury	35	34	1	97%
Wayland	36	33	3	92%
Weston	26	22	4	85%
<i>total</i>	<i>388</i>	<i>362</i>	<i>26</i>	<i>93%</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 locally restricted units.

Resales	FY20	FY21	FY22
Acton	1	1	
Bedford		2	
Concord	2	3	2
Lexington	1		
Lincoln	1	3	2
Maynard			1
Sudbury	1	2	1
Wayland		1	
Weston	1	1	
	7	13	6
Resale Fee	\$31,321	\$64,682	\$23,484

This year have brought an unprecedented number of resales in the RHSO area, with 13 resale units closing in FY21, compared to 7 in FY20 (which was a substantial increase over FY19). FY22 is starting strong, with 2 new units starting to market in the upcoming month, and inquiries from many owners.

The RHSO provides these resale services as part of its core monitoring efforts, and the town receives the resale fee associated with the transaction, which is sometimes used

to offset RHSO membership fees. Municipalities can also purchase additional hours if the work on 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.

In general, the monitoring review includes:

1. Reviewing that the rents are assessed 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.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

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

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. Reviewing annual rent increase requests and recommending approvals. [on hold during COVID, with guidance coming for 2021 rent increases.]

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. There is a moratorium of both rent increases and evictions, per DHCD guidance and rental re-certifications are slower and delayed.

	Town	Rental Development Name	SHI units	Restricted Units	Subsidy Program	FY21 status
1	Acton	Scattered sites (AHA)	8	8	LIP 40B	Complete (to DHCD)
2	Acton	Inn at Robbins Brook	3	3	LIP-LAU	FY22
3	Acton	Avalon	86	22	LIP-40B	Complete (to DHCD)
4	Bedford	Village at Concord Road	12	3	LIP 40B	Incomplete
5	Bedford	20 Railroad	8	8	HOME	Complete (to Consortium)
6	Bedford	Patriot Place	10	7	LIP 40B	Complete (to DHCD)
7	Bedford	Village at Taylor Pond	200	50	LIP-LAU	Complete (to DHCD)
8	Bedford	Bedford Village	96	96	CPA	FY22
9	Bedford	447 Concord Road	14	12	HOME	FY22, with Bedford Village
	Bedford	Ashby	4	4	HOME	In Process
10	Concord	Concord Prescott	350	88	LIP 40B	Under Review
11	Concord	Concord Park	16	16	Local	FY22
12	Concord	405 Old Bedford Road (CHA)	4	4	LIP LAU	Complete (to DHCD)
13	Concord	Brookside Square	74	8	LIP-LAU	Stalled by property
14	Concord	Warner Woods	80	16	MH NEF	
15	Concord	Thoreau St (CHA)	1	1	HOME	FY22
16	Concord	Peter Bulkeley (CHA)	28	28	HOME	FY22
17	Lexington	Avalon at Lexington Hills	387	97	LIP 40B	Complete (to DHCD)
18	Lexington	Avalon Lexington	198	56	Local	Complete (to DHCD)
19	Lexington	LexHAB Scattered Sites	48	48	various	Complete (to DHCD)
20	Lexington	Pine Grove Village	5	5	HOME	In Process
21	Lexington	Keeler Farm	1	1	HOME	FY22
22	Lincoln	Commons	30	8	LIP 40B	FY22
23	Lincoln	Oriole Landing	60	15	LIP LAU	FY22
24	Maynard	Maynard Crossing, Vue	180	22	LIP LAU	Complete (to DHCD)
25	Sudbury	Willis Lake (SHA)	1	1	LIP-LAU	FY22
26	Sudbury	Avalon	250	63	LIP 40B	Under Review
27	Sudbury	Coolidge (I and II)	120	120	HOME	In Process
28	Wayland	Residences At Wayland Center	12	12	LIP-LAU	Complete (to DHCD)
29	Weston	Church, Jones, Pine, Viles	6	6	LIP LAU	FY22
30	Weston	Warren Ave	7	5	LIP 40B	FY22
31	Weston	Merriam Village	62	5	LIP LAU	On hold
			2361	838		



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

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

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: Assisted the town with inquiries on a foreclosure at Brewster, completed monitoring for the Acton Housing Authority owned LIP units.

In Bedford: Escalated rental monitoring compliance of Village at Concord Road, completed monitoring for Village at Taylor Pond and Patriot Place, supported the closing of the resale unit at Carter Way, reviewed refinancing information for an owner at Evergreen.

In Concord: Recommended approval for 2 refinances at Finigan's Way, supported the closing at Emerson Annex including the town and DHCD funding for the buy-down and repairs; assisted with the resale unit at Riverbend by marketing the unit, locating and approving an eligible purchaser, preparing a release of the local restriction and regulating the unit under LIP (to include on the SHI), completed for the Concord Housing Authority owned LIP units, started monitoring Brookside Square and Prescott.

In Lexington: Added Wright Farm to the SHI, worked with LexHAB and the Town on transferring the role of Muzzey Administrator to the Town (with the RHSO assisting), completed monitoring for the two Avalon properties.

In Lincoln: Starting marketing for the resale at Minuteman Commons; assisted owner at Battle Road Farm in submitting the information to start the resale process

In Maynard: Completed monitoring for the Vue.

In Sudbury: Responded to inquiries on Maximum Resale Prices at Grouse Hill; recommended approval for a refinance at Snowberry Lane; started monitoring at Avalon, conducted a site visit to damaged property on Dutton Road with Habitat

In Wayland: No monitoring activities this period.

In Weston: Assisted with sending a residency violation letter to an owner, worked with owner on condo association required exterior capital improvement.

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 ~\$2,400,000 since FY13.

In this reporting period the RHSO attended the quarterly HOME meeting in May, facilitated completion of the annual sub-recipient agreements (except Wayland) and completed requisitions for administration, as well as:

- Analysis of Impediments: Final document published in April, including the Action Plan. Prepared a proposal for the Consortium for funding of a comprehensive testing program, and received approval for \$100,000 of competitive pool funds.
- Bedford: The Ashby Place project, renovations in the community building, has completed construction and the final requisition and project close out process is in process. The Bedford Initial Rental Assistance Program (TBRA) is funded for FY21 for \$15,550 with no cases received to date.



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

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

- Concord: Christopher Heights - Received HUD approval for release of funds and starting to prepare the commitment funding agreement. Gerow Property – Received HOME funds award from the consortium competitive funds and started to complete the environmental review materials.
- Lexington: Lexington has \$30,040 of FY21 funds available with no projects in the pipeline.
- Sudbury: Coolidge II HOME project has completed construction, final requisition processed and project closeout complete.
- Wayland: Wayland Initial Rental Assistance Program (TBRA) is funded for FY21 for \$8,280.

Local Support:

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

Acton: Assisted with the Tavernier Place development as it moves towards closing, assisted in safe harbor discussions and supported the ACHC by attending meetings, taking minutes, and following up as needed.

Bedford: Attended Bedford Housing Partnership and Bedford Municipal Affordable Housing Trust meetings, supported the Small Grant Program by preparing the applications for review and approval, drafting the award materials, continued review for 330 South Street with updated materials.

Concord: Facilitated a Housing Roundtable with presentation by the League of Women Voters on potential town-owned sites for affordable housing. Assisted a research project on 40B developments conducted by students at Tufts University looking at concerns from the community and whether they materialized after a project was completed. The project focuses on four specific 40B developments, one of which is the Shaw Farm development at 1257 Elm Street in Concord. For Christopher Heights at Junction Village: continued monthly status meetings, supported Open Space Task Force by preparing a timeline, facilitating a meeting with the DOC, preparing the contract for the Open Space Landscape Architect. Assisted the Concord Housing Authority as a member on their executive director search committee. Assisted the CHDC by preparing agendas and meeting materials, supporting the CPC proposal for buy-down funds through town meeting, assisting with the 930 Main St development sewer payment and ground breaking, submitting a CPA reimbursement for Junction Village eligible expenses.

Lexington: Assisted with the discussion on creating a Municipal Affordable Housing Trust and a housing development corporation to advance housing production; continued discussion on the comments for National Development Waterstone affordable housing materials.

Lincoln: Supported Small Grant Program materials to all owners at Battle Road Farm for the Lincoln Foundation's pilot program, started review of Accessory Apartment program materials.

Maynard: Reviewed materials and spoke to attorney for property at 16 Waltham; assisted with the LIP application review for Old Bay Road; continued administration of ERAP and MAP with review of new and renewed applicants, and submission of monthly rent invoices.

Sudbury: Continued administration of ERAP with expanded program guidelines, review of applicants, and submission of monthly rent invoices. Supported the Sudbury Housing Trust by: preparing agendas, supporting annual financial audit, packets and Town Annual Report; supporting the proposal for CPC funds; and Small Grant Program by reviewing and presenting applications for consideration, drafting the award



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

documents and processing invoices for awarded funds. In addition, under the Sudbury Trust umbrella, the RHSO performed lottery and monitoring services for other entities in the region, as follows:

- MassHousing monitoring contract: Reviewed deed restriction errors with MassHousing for transferred legacy units. Completed the annual MassHousing compliance report for the 68 units in the program. Started marketing, held lottery, certified buyer, facilitated P&S signing for Westford unit.
- Cold Brook Crossing: Continued review of the affordable housing restriction, and Affirmative Fair Housing Plan.
- Accepted new contract for resale units in Sherborn, and lottery in Natick.
- Completed Affirmative Fair Housing Marketing Plan for Lexington Meadows
- Started marketing for Village at Bedford Woods, Lexington Meadows.
- Held lottery for Harvard Trail Ridge.
- Supported contracts and remaining closings for Harvard Trail Ridge Sherborn Fields at Sherborn Falls, Acton Post Office Square, and Reading Postmark Square.

Wayland: No support this period.

Weston: Continued administration of ERAP with review of new and renewed applicants, and submission of monthly rent invoices. Assisted the HPP effort by supporting the HPP Steering Committee and Town with project administration. Initial review of HPP with Select Board and Planning Board with plan adoption anticipated for FY22 Q1. Assisted the Weston Affordable Housing Trust with its projects and programs, including: preparing meeting agendas and packets; ongoing asset management of Warren Avenue housing development; and continued support the development at 0 Wellesley, working with Habitat to develop six-affordable homes. Prepared comment letter for the Housing Trust for proposed 40B development including letter to MassHousing requesting limits on rent increases at lease renewal. Started to assist the Elderly Housing Committee with plans to expand Brook School and apply for CPC funds



Regional Housing Services Office

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

Address: 37 Knox Trail, Acton, MA 01720

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

FY21 Tracking:

The final FY21 hours are shown in the table to the right.

We monitor the hours for each community monthly and work together as the year closes to ensure that the over/under is +/- 10 hours (which are forgiven), and which monies can be rolled over to next fiscal year.

	FY21 Actual	FY21 Budget	Actual v Budget
Acton			
Monitoring	85.75	80.00	5.75
40B Monitoring	20.75	0.00	20.75
Local Support	324.50	331.00	(6.50)
ACHC	51.50	104.00	(52.50)
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	546.75	555.00	(8.25)
Bedford			
Monitoring	152.50	179.00	(26.50)
HOME administration	42.00	40.00	2.00
Local Support	198.75	200.00	(1.25)
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	457.50	459.00	(1.50)
Concord			
Monitoring	181.75	80.00	101.75
HOME administration	84.25	80.00	4.25
Local Support	185.25	250.00	(64.75)
CHDC	101.00	165.00	(64.00)
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	616.50	615.00	1.50
Lexington			
Monitoring	112.50	140.00	(27.50)
HOME administration	37.25	40.00	(2.75)
Local Support	175.00	164.00	11.00
Regional Activities	26.50	20.00	6.50
Admin	37.25	20.00	17.25
Total	388.50	384.00	4.50
Lincoln			
Monitoring	146.25	160.00	(13.75)
Local Support	60.25	77.00	(16.75)
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	270.75	277.00	(6.25)
Maynard			
Monitoring	44.75	40.00	4.75
Local Support	76.50	175.00	(98.50)
Maynard AHT	84.50	20.00	64.50
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	270.00	275.00	(5.00)
Sudbury			
Monitoring	106.75	80.00	26.75
HOME administration	36.50	50.00	(13.50)
Local Support	95.75	200.00	(104.25)
Sudbury AHT	625.00	565.00	60.00
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	928.25	935.00	(6.75)
Wayland			
Monitoring	27.75	30.00	(2.25)
HOME administration	30.25	54.00	(23.75)
Local Support	35.50	30.00	5.50
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	157.75	154.00	3.75
Weston			
Monitoring	46.00	40.00	6.00
Local Support	64.00	90.00	(26.00)
HPP	215.50	233.00	(17.50)
Weston AHT	204.50	200.00	4.50
Regional Activities	26.50	20.00	6.50
Admin	37.75	20.00	17.75
Total	594.25	603.00	(8.75)
Totals	4230.25	4257.00	(26.75)