



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, 2022

Applicant: Town of Concord

Co-Applicant (if applicable): _____

Project Name: Regional Housing Services Office (RHSO)

Project Location/Address: 141 Keyes Rd. / 37 Knox Trail

Purpose: (Select all that apply)

- Open Space Community Housing Historic Preservation Recreation

Project Budget:

Amount of CPA Funds Requested: \$ 33,000

Amount from Other Funding Sources: \$ 28,000 + \$4,000

Total Project Budget: \$ 65,000
(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): H. J. P. L. E. E. D.

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 \$33,000 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 eleventh 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 715 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 10.41% (based on the 2010 Census).
- 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 Fair Housing Testing and securing HOME funds for the Junction Village/Christopher Heights project.
- 4) Local Support for Concord's Housing Non-Profits - RHSO staff support is also 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 Assabet River Bluff. The RHSO is also assisting the newly-formed Concord Municipal Affordable Housing Trust.

- 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 – 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 \$65,000 for the program, a modest increase over last year. This includes funding from the CHDC (\$4,000), funding from town funds (\$28,000) and the \$33,000 from CPA. 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 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 –FY2022 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 2022 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 assisting in development of new affordable housing options (such as preliminary design for the Assabet Bluff housing initiative), 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, in addition to providing matching funds for this program through the annual town budget appropriation (Planning Division budget).

- 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 \$65,000. 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 annually after. 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 30, 2022

To: John Mangiaratti, Sarah Stanton, Kerry LaFleur, James Malloy, Timothy Higgins, Greg Johnson, Maryanne Bilodeau, Stephen Crane, Leon Gaumond, Janet Adachi, Kristen Guichard, Jeff King, Marcia Rasmussen, Lee Smith, Carol Kowalski, Abby McCabe, Paula Vaughn, Rick Lefferts, Bill Nemser, Megan Zammuto, Adam Duchesneau, Carmine Gentile, John Bugbee, Imai Aiu, Sarah Rhatigan

CC: Jody Kablack, Lara Plaskon, Liz Valenta, Suzi Solomon

From: Elizabeth Rust

RE: Regional Housing Services Office – FY22 Q4, Status Report

This is the Q4 FY22 final status report for activity from 4/1/22 through 6/30/22 for the 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:

During the year, we added 7% of additional hours through supplemental services for Concord, Acton and Lincoln, and ended the year with delivery of 4,130 hours at \$326,796 - an hourly rate of \$79.13.

We sadly accepted the resignation from Liz Valenta, a senior staff of the RHSO staff, and have advertised for a new person.

The annual RHSO leadership meeting was held in May, and from there the FY23 budget was confirmed, the IMA amendment voted and then signed by all member communities. This is the last year of the 3-year IMA term, and a new term will be prepared for FY24, with any changes in membership or terms.

Regional Activities:

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

The RHSO continues to administer rental assistance programs for our member communities: the Sudbury Housing Trust implemented a rental relief program (Sudbury Rent Relief Program SRRP) to significant response. The RHSO is administering a Mortgage Assistance Program for Sudbury using ARPA funds.

Our annual homeowner training session (5/17/22) was well attended by 16% of the owners of restricted properties (75 people). We reviewed the provisions deed rider, process for refinancing and selling, overview from an attorney on condo ownership, and Q&A. We have joined the Community Associations Institute New England Chapter (CAI), which provides information, education and resources to condominium trustees and professionals. We have posted their information on our website, and are preparing a mailing to smaller self-managed associations.

The RHSO is investigating expanding our services to include broader tenant support services at the request from Acton and approval from the other town leaders. We are interviewing and reviewing current practices and will present findings and options to the Advisory Committee at their next meeting.

The RHSO is recognized for its expertise in the AFHMP, lottery and resident selection area, and assisted MassHousing/MHP with their training again this quarter.

SHI, 40B Safe Harbor and Inventory Administration

Managing the SHI inventory is a key component of the RHSO services provided. A total of 1,094 units have been added to the Subsidized Housing Inventory for the members since joining the RHSO. Most (seven of the



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nine) communities are in safe harbor through either meeting the 10% or through a certified Housing Production Plan, with the HPP safe harbor is temporary (one or two years).

This quarter the RHSO assisted member communities in responding to the DHCD Biennial SHI survey to verify the accuracy of the SHI report.

This quarter we broke out the number of market rate units on each communities SHI, reported that on our website, and have listed it here below.

	Housing Units	SHI units	SHI%	Market Rate Units on the SHI	FY22 SHI Change	FY23 SHI Pipeline	40B Safe Harbor
Acton	8,475	735	8.67%	300	-161 units: Tavernier Place (31), McManus Manor (41), DSS (5), Grandview (-8), Powder Mill (-230),	26 Carlisle Rd (1), Craftsman Village (2)	
Bedford	5,322	987	18.55%	400	6 units: DDS units (6)	Village at Bedford Woods (6)	Over 10%
Concord	6,852	713	10.41%	358	-8 units: Forest Ridge (1), DDS units (-9)	Junction Village (83), 930 Main St (2), Millrun (1)	Over 10%
Lexington	11,946	1,320	11.05%	657	-15 units: DDS units (-15)	186 Bedford St (13), Waterstone Lexington (21)	Over 10%
Lincoln	2,130	298	13.99%	120			Over 10%
Maynard	4,430	424	9.57%	18	5 units: DDS units (5)	Wisteria Lane (1), Maynard Square (26)	
Sudbury	5,921	775	13.09%	297	106 units: Cold Brook Crossing (101), DDS (5)		Over 10%
Wayland	4,957	477	9.62%	202	-71 units: Michaels Road (1), Cascade (-60), Windsor Place (-12)	Hammond Road (1)	Over 10%, HPP Certified to 5/17/23
Weston	3,952	151	3.82%	0	-180 units: Moderna Weston (-180)		HPP Certified to 11/23/22
total	53,985	5,880	10.89%	2352			

The SHI denominator is the total number of *year-round* housing units as reported in the latest Census. While the Census published the total housing units for each community, the number of seasonal units is not available now, and is not projected to be available until later in 2022, which delays the SHI recalibration. Using the 2010 seasonal units as an approximation, the 2020 SHI might look like this for each member community.



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Further SHI Analysis	Current SHI		Using 2020 and 2010 data					
	SHI %	+/- 10%	2020 Housing Units	2010 Seasonal	2020 Estimate Denominator	Using SHI Numerator 6/2022	Estimated 2020 SHI %	+/- 10%
Acton	8.67%	-113	9,219	55	9164	735	8.02%	-182
Bedford	18.55%	455	5,444	46	5398	987	18.28%	448
Concord	10.41%	28	7,295	95	7200	713	9.90%	-7
Lexington	11.05%	126	12,310	73	12237	1,320	10.78%	97
Lincoln	13.99%	85	2,771	26	2745	298	10.85%	24
Maynard	9.57%	-19	4,741	17	4724	424	8.97%	-49
Sudbury	13.09%	183	6,556	30	6526	775	11.87%	123
Wayland	9.62%	-19	5,296	64	5232	477	9.11%	-47
Weston	3.82%	-245	4,043	56	3987	151	3.78%	-248

Monitoring:

The monitoring program is a core service of the RHSO with over 6,000 units of SHI rental and ownership restricted housing across the communities, of those, the RHSO monitors 366 ownership units, and 844 rental units.

The MassHousing 40B ownership units have a third-party monitor assigned, and the Sudbury Housing Trust (SHT) is one such monitor, monitoring 69 units across 11 developments, of which 59% are located in RHSO communities. We have broken out the RHSO-based units in the table.

Ownership Units: The ownership monitoring has completed for FY22, with the following steps:

- Self-certifications to each owner: The initial letters were mailed in October, second letters in January and third notices in March. We achieved a 93% response – same as last year.
- Review the registry of deeds: Complete in January. Violation letters sent in Q3.
- Review owner mailing address versus town database (Complete Q2)
- Review on-line sites for rentals (Complete Q3)
- Provide annual certification reports to DHCD (**All reports were sent to DHCD this quarter**)
- Send Welcome Letters to new owners (9 total)

6/30/2022	FY22 Self-Declaration				
	Sent from RHSO	Sent from SHT	Rec'd	Open	% rec'd
Acton	61	10	69	2	97%
Bedford	53	0	50	3	94%
Concord	72	2	70	4	95%
Lexington	25	0	25	0	100%
Lincoln	55	0	48	7	87%
Maynard	0	6	6	0	100%
Sudbury	9	23	31	1	97%
Wayland	22	0	18	4	82%
Weston	27	0	24	3	89%
<i>total</i>	324	41	341	24	93%

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.



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	FY20	FY21	FY22	FY23 (IP)
Acton	1	1		1
Bedford		2	1*	
Concord	2	3	2	
Lexington	1			
Lincoln	1	3	3	2
Maynard				
Sudbury/SHT	1	2	3	2
Wayland		1	2*	
Weston	1	1		1
	7	13	11	9
	\$31,231	\$64,682	\$31,231	

FY22 ended with strong resale activity with 11 units closed.

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.

The resales can be complicated based on the desirability and price of the unit, and other factors. Municipalities may also purchase additional hours if the work on resales extend past the contracted support level.

Rental Projects: On behalf of the member communities, the RHSO monitors Local Initiative Program (LIP) rental units and units funded with HOME funds, as required by the funding Regulatory Agreements.

DHCD (and the subsidizing agencies) issued rent increase guidance in December, and in this quarter we worked with various property managers on their specific increases for town approval.

In general, the rental monitoring review includes:

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

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.



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	Town	Rental Development Name	SHI units	Restrict ed Units	Subsidy Program	Rent Approval	FY23 Plan	Date of Last Report
1	Acton	Scattered sites (AHA)	8	8	LIP 40B		FY23	6/2021
2	Acton	Inn at Robbins Brook	3	3	LIP-LAU		Q4	7/14/2022
3	Acton	Avalon	86	22	LIP-40B	1/2022	Q1	6/2021
4	Bedford	Village at Concord Road	12	3	LIP 40B		Q2	10/2021
5	Bedford	20 Railroad	8	8	HOME		Q4	10/2020
6	Bedford	Patriot Place	10	7	LIP 40B	In process	Q3	3/2022
7	Bedford	Village at Taylor Pond	200	50	LIP-LAU	1/2022	Q1	4/2021
8	Bedford	Bedford Village	96	96	CPA			New Property
9	Bedford	447 Concord Road	14	12	HOME		Q4	06/2022
10	Bedford	Ashby	4	4	HOME		Q4	New Property
11	Concord	Concord Prescott	350	88	LIP 40B	1/2022	Q2	10/2021
12	Concord	Concord Park	16	16	Local		Q3	
13	Concord	405 Old Bedford Road	4	4	LIP LAU		Q4	1/2021
14	Concord	Brookside Square	74	8	LIP-LAU	5/2022	Q3	3/2022
15	Concord	Warner Woods	80	16	MH NEF			
16	Concord	Thoreau St (CHA)	1	1	HOME		FY24	3/25
17	Concord	Peter Bulkeley (CHA)	28	28	HOME		Q2	In Process
18	Lexington	Avalon at Lexington Hills	387	97	LIP 40B	2/2022	Q1	In Review
19	Lexington	Avalon Lexington	198	56	Local	2/2022	Q1	In Review
20	Lexington	LexHAB Scattered Sites	48	48	various		Q1	In Review
21	Lexington	Pine Grove Village	5	5	HOME		Q4	8/2020
22	Lexington	Keeler Farm	1	1	HOME		Q4	6/2022
23	Lincoln	Commons	30	8	LIP 40B	8/2017	Q3	3/2022
24	Lincoln	Oriole Landing	60	15	LIP LAU	2019	Q2	1/2022
25	Maynard	Maynard Crossing, Vue	180	22	LIP LAU	1/2022	Q1	5/2021
26	Maynard	42 Summer	24	6	LIP 40B	2/2022	Q1	New Property
27	Sudbury	Willis Lake (SHA)	1	1	LIP-LAU		Q1	In Review
28	Sudbury	Avalon	250	63	LIP 40B	1/2022	Q2	10/2021
29	Sudbury	Coolidge (I and II)	120	120	HOME		Q4	06/2022
30	Wayland	Residences @ Wayland Cntr	12	12	LIP-LAU	4/2019	Cancelled	3/2020
31	Wayland	Oxbow (River's Edge)	218	55	LIP-LAU		FY24	New Property
32	Weston	Church, Jones, Pine, Viles	6	6	LIP LAU			2018
33	Weston	Warren Ave	7	5	LIP 40B			2018
34	Weston	Merriam Village	62	5	LIP LAU			New Property
			2603	899				

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 with resale process for home at Brewster Lane, recommended approval for a refinancing at High Street, started resale at Acton Meadows, completed monitoring for Inn at Robbins Brook, continuing to recommend stronger marketing.

In Bedford: Started outreach to Avalon to record a local restriction since the financing has been discharged, and with it the MassHousing regulatory agreement, though the units are protected through the



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

Comprehensive Permit. Started working with the owners at Winterberry at resale, responded to owner inquiry at Shawsheen. Investigated assertion at the Bedford Veterans Quarter regarding Town HOME funds obligations, which turned out to be incorrect.

In Concord: Recommended approval for a refinancing at Shaw Farm Village, completed the resale at Finigans Way.

In Lexington: Assisted the owners at Muzzey School with numerous inquiries for unit values at for refinancing and resale purposes. Completed the monitoring research and analysis for the two Avalon properties, and the scattered LexHAB sites.

In Lincoln: Assisted the Commons with leasing a vacant unit in compliance with standards, completed the resale at 8D North Commons (the town received \$95k in exchange for releasing the restriction in this hard-to-sell unit), worked on the resale of 46D Indian Camp Lane (closing 7/20/22), continued to work with two owners of restricted units at Minuteman Commons who want to sell but need to wait for the septic issues to get resolved.

In Maynard: Supported the LIP Regulatory Agreement execution and closing at Old Bay Road/Wisteria Lane/150 Parker Street.

In Sudbury: Prepared the closing documents for a resale unit at Grouse Hill

In Wayland: Attended the lottery for Oxbow development (River's Edge), as part of local monitoring. Assisted an owner at Willowbrook with condominium-led capital improvements and attended a meeting of the condo association in that assistance.

In Weston: Worked on the resale at Dickson Meadows by preparing resale price, draft memos for the town and participating in discussion with the Town and Trust. Continued to discuss residency issue with owner at Dickson 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 ~\$2,700,000 since FY13.

In this reporting period the RHSO attended the quarterly HOME meeting in May, completed the annual CAPER plan documents in June as well as:

- Fair Housing: Worked with Newton and Suffolk University Housing Discrimination staff to host a well-attended Fair Housing event on April 26.
- Bedford: Completed two cases for the reinvigorated the Bedford Initial Rental Assistance Program (TBRA) program for a total of \$3,925, with a remaining balance of \$11,725. Completed 2022 HOME monitoring for 447 Concord Road.
- Concord: Christopher Heights –Further work on hold until project financing is firm. Completed the parking counts for the MAPC parking study. Started 2022 HOME monitoring for Thoreau Street – will finish once inspections issues are addressed (estimated in 6 months). Completed 2022 HOME monitoring for Peter Bulkeley.



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- Lexington: Continued discussions with Lexington Housing Authority to utilize the FY22 and FY23 HOME funds towards the extensive modernization project at Vynebrook Village, a 48 unit state-aided elderly/disabled public housing. The project includes complete kitchen and bath renovations, and other improvements including painting and flooring, as well as converting 3 units into fully accessible ADA units. The cost estimate of the project is over \$4.6million, funded through DHCD and CPA. Project commitment planned for the fall. Completed the parking counts for the MAPC parking study. Completed 2022 HOME monitoring for Keeler Farm.
- Sudbury: Completed 2022 monitoring for the Coolidge II.
- Wayland: Completed one case for the Wayland Initial Rental Assistance Program (TBRA) for \$1,600, with a remaining balance of \$6,850. Continued to provide information regarding the use of HOME funds for 12 Hammond Road, as a potential new project applying for the Competitive Pool in the summer.

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: Continued monthly status meetings. Supported the ACHC by attending meetings, taking minutes, and following up as needed as well as recommending enhancements to the Capital Improvement Program, which have been approved and implemented.

Bedford: Attended Bedford Housing Partnership and Bedford Municipal Affordable Housing Trust meetings and responded to inquiries on agenda items as requested. Supported the Small Grant Program by drafting updates to the current program application, and supporting the current grant cycle.

Concord: Continued monthly status meetings. For Christopher Heights at Junction Village: continued to support the town and CHDC in project status. Assisted the Town and CHDC with feasibility and due diligence on Assabet River Bluff project, an open space and housing joint initiative, supporting soil testing and engineering, CHDC tenant preparations, funding and town meeting support and weekly project team meetings. Assisted the CHDC by preparing agendas and meeting materials, and scheduling and convening meetings. Continued work on the Concord Housing Production Plan with presenting needs assessment information at a Public Forum in June, scheduling and convening the HPP Steering Committee, and continuing the drafting of the needs assessment chapter of the document with demographic research.

Lexington: Continued monthly status meetings. Continued support and review of DHCD LIP materials and Moderate income unit materials for the units at the National Development Waterstone and Bridges development. Supported the Affordable Housing Trust Study Committee by attending meetings and providing background information.

Lincoln: Supported the Lincoln Foundation Small Grant Program summer application funding round.

Maynard: Continued monthly status meetings.

Sudbury: Reviewed and qualified an applicant for the Frost Farm waiting list. Supported the Sudbury Housing Trust by: preparing agendas, financial tracking reports, packets, Annual Report, and Small Grant Program by processing invoices for awarded funds. Continued support for the Sudbury Rent Relief Program (SRRP) by qualifying an additional 4 application for payments, and processing payments for May/June/July rents – this program will provide \$190k of assistance to 56 tenants through November.



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Supported the implementation of Sudbury's Mortgage Assistance Program using state subsidy. In addition, under the Sudbury Trust umbrella, the RHSO performed lottery and monitoring services for other entities in the region, as follows:

- MassHousing Contract: Started resale at Tadmuck, send a residency violation letter to an owner at Southgate.
- Cold Brook Crossing: Monitored the lottery, reviewed and approved 2022 rents.
- Accepted contract for Pleasant Street in Ipswich, Cedar Hill in Westwood, Settler's Glen in Wareham
- Drafted marketing materials for Millrun in Concord
- Supported marketing for Graystone in Natick, Wellington Woods (Phase 2) Medford
- Supported contracts and closings for Wellington Woods.

Wayland: Continued to provide information on capital improvement programs.

Weston: Continued monthly status meetings. 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; updated Weston Rental Housing listing, drafted Affordable Deed Restricted Home Preservation Fund CPC application, received Housing Trust financial statements, and continued support the development at 0 Wellesley, working with Habitat to develop six-affordable homes through the LIP Comprehensive Permit process.



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FY22 Tracking:

The final FY22 hours are shown in the table to the right.

The final tracking includes reduction of hours, with corresponding refunds towards FY23 fee, for Concord and Sudbury. All other communities were +/- 10 hours – which are forgiven in terms of settling up.

The overall netted out to the RHSO working 31.25 hours over the paid amounts – which generally worked out given the differing pay levels of the individual RHSO staff.

	FY22 Actual	FY22 Budget	Actual v Budget
Acton			
Monitoring	129.00	85.00	44.00
40B Monitoring	2.50	0.00	2.50
Local Support	198.75	166.00	32.75
ERAP	35.00	0.00	35.00
ACHC	47.50	180.00	(132.50)
Regional Activities	30.00	25.00	5.00
Admin	39.75	20.00	19.75
Total	482.50	476.00	6.50
Bedford			
Monitoring	88.75	125.00	(36.25)
HOME administration	92.00	40.00	52.00
Local Support	102.25	100.00	2.25
BHP/MAHT	60.75	103.00	(42.25)
Regional Activities	30.00	25.00	5.00
Admin	39.75	20.00	19.75
Total	413.50	413.00	0.50
Concord			
Monitoring	146.75	85.00	61.75
HOME administration	50.50	80.00	(29.50)
Local Support	242.50	250.00	(7.50)
CHDC	108.00	200.00	(92.00)
HPP	126.75	86.00	40.75
Regional Activities	30.00	25.00	5.00
Admin	39.25	20.00	19.25
Total	743.75	746.00	(2.25)
Lexington			
Monitoring	111.50	145.00	(33.50)
HOME administration	57.75	40.00	17.75
Local Support	167.75	170.00	(2.25)
Regional Activities	30.00	25.00	5.00
Admin	40.25	20.00	20.25
Total	407.25	400.00	7.25
Lincoln			
Monitoring	173.00	265.00	(92.00)
Local Support	89.75	40.00	49.75
Lincoln Board/MAHT	47.00	23.00	24.00
Regional Activities	30.00	25.00	5.00
Admin	40.25	20.00	20.25
Total	380.00	373.00	7.00
Maynard			
Monitoring	31.50	45.00	(13.50)
Local Support	44.50	35.00	9.50
Maynard AHT	10.00	25.00	(15.00)
Regional Activities	30.00	25.00	5.00
Admin	40.25	20.00	20.25
Total	156.25	150.00	6.25
Sudbury			
Monitoring	60.50	85.00	(24.50)
HOME administration	29.50	40.00	(10.50)
Local Support	62.50	150.00	(87.50)
Sudbury AHT	664.00	569.00	95.00
Regional Activities	30.00	25.00	5.00
Admin	40.25	20.00	20.25
Total	886.75	889.00	(2.25)
Wayland			
Monitoring	9.75	30.00	(20.25)
HOME administration	30.00	50.00	(20.00)
Local Support	48.25	30.00	18.25
Regional Activities	30.00	25.00	5.00
Admin	40.25	20.00	20.25
Total	158.25	155.00	3.25
Weston			
Monitoring	42.25	45.00	(2.75)
Local Support	147.50	100.00	47.50
HPP/EHC	73.50	0.00	73.50
Weston AHT	199.50	338.00	(138.50)
Regional Activities	30.00	25.00	5.00
Admin	40.25	20.00	20.25
Total	533.00	528.00	5.00
Totals	4161.25	4130.00	31.25