

RECEIVED

Appendix I



TOWN OF CONCORD
COMMUNITY PRESERVATION COMMITTEE

141 KEYES ROAD, CONCORD, MA 01742
TEL. (978) 318-3290 FAX (978) 318-3291

SEP 12 2024

PLANNING DIVISION
TOWN OF CONCORD MA

Application for CPC Funding

Due no later than 12:00 noon on Friday, September 13, 2024

Applicant*: Town of Concord
Federal Tax Id. No.*: 046-001-121
Co-Applicant (if applicable): _____

Project Name*: Regional Housing Services Office
Project Location/Address (if applicable): 141 Keyes Road Concord
Purpose*: (Select all that apply)

- Open Space
- Community Housing
- Historic Preservation
- Recreation

Project Budget*:
Amount of CPC Funds Requested: \$ 43,500
Amount from Other Funding Sources: \$ 33,500
Total Project Budget: \$ 77,000
(If multi-year project, note current phase only)

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

- One Paragraph Project Summary *
- Map (if applicable)
- Narrative *
- Selection Criteria and Needs Assessment
- Detailed Project Budget *
- Feasibility Assessment
- Statement of Sustainability (if applicable)
- Timeline *
- Architectural plans, site plans, photographs (if appropriate)
- Copy of IRS determination letter (Non-profit Organizations only)*
- Completed W-9 Form (Non-profits only)*
- Copy of Audit or most recent Financial Information (Non-profits only)*
- Letters of Support (if any)

Project Contact Person*: Megan J. Zammuto
Project Contact Address*: 22 Monument Sq Concord, MA
Project Contact Phone*: 978-318-3006 Email*: mzammuto@concordma.gov

Authorized Signature of Applicant*: Megan J Zammuto
Authorized Signature of Property Owner* (if different): Kerry S. Fajuru

* Required

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 \$43,500 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 ten communities including Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Natick, Sudbury, Wayland, and Weston. The RHSO provides professional staff support to all ten 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, and recently expanded to ten communities total. 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 919 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. Concord's SHI is now 12.81%, an increase from last year's 9.97%. New units that were added this year include Mill Run (1 unit) Habitat for Humanity on Commonwealth Ave (1 unit) NOVO 40B (201 units) Forest Ridge (1 unit).
- 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 represents Concord through all required consortium administrative requirements including bi-annual monitoring of HOME assisted units in Concord (2 units), the annual action plan and CAPER report, participation in the Fair

Housing testing efforts and other efforts.

- 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 continued working with the Concord Housing Development Corporation (CHDC) on the development of the Assabet River Bluff property permitting and development, and the continued administration of the Small Grants Program, as well as the on-going support of the organization's administrative needs.
- 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 request includes an additional \$10,000 over last year. The increased request for FY26 represents a temporary increase in our program budget. This additional amount is crucial for a specific, one-time adjustment related to our leadership transition.

The RHSO Director plans to retire June 30, 2026 after supporting affordable housing initiatives in Concord for the past fifteen years. To ensure a smooth and uninterrupted continuation of our programs, we are implementing a strategic transition plan that involves overlapping the tenure of the new RHSO Director with that of the current one. This overlap, occurring in Fiscal Year 2026, is essential for effective knowledge transfer and mentoring, allowing the new leader to become fully acclimated with our operations and strategic goals.

The \$10,000 increase will cover the costs associated with this transition period, including additional salary expenses for the dual leadership roles and the training and onboarding of the new RHSO

Director. This investment will not only safeguard the continuity of our programs but also strengthen our organizational stability. The cost associated with this transition will be shared across all member communities. This CPA request of \$43,500 will be supplemented by town funds budgeted for FY26 in the amount of \$33,500.

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 –FY2024 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 2022 Housing Production Plan includes an action plan with 24 Housing Strategies. The RHSO is listed as a partner in implementation support for **Strategy #24 Foster outreach and education about local and regional affordable housing needs through a positive public relations campaign**. Continuing to Host and Support Membership in the Regional Housing Services Office is specifically identified as **Strategy #18**. The RHSO also consults and supports town staff with assigned strategies including the following:

- **Strategy #3: CMAHT pursues other land for the creation of affordable housing**
 - RHSO is currently developing options for how to pursue and develop 91B Main Street
- **Strategy #4: CMAHT negotiates increased affordable units in privately developed projects**
 - RHSO is available to review and assist with the affordable housing component of development agreements. RHSO staff worked closely on the Forest Ridge SHI unit affordable housing restriction and will assist with the upcoming review of the affordable housing component of the Forest Ridge 40B project. .
- **Strategy #8: Zoning consistent with MBTA Communities Law**
 - Supports staff with outreach efforts and provides input regarding the law's affordable component.
- **Strategy #20: Continue to participate in the west metro HOME Consortium.**
 - Supports town staff by providing administrative support in this effort.

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.

This project assists with **FY25 Select Board goal to provide Effective and Transparent Governance** by improving committee processes, specifically by hosting periodic topical discussions. RHSO staff assists to plan coordinate and facilitate quarterly Housing Round Table meetings which have been a very productive way of bringing dedicated community organizations together to revisit the Housing Production Plan and strategize about how to achieve the goals outlined in the plan.

This funding request also aligns with the **FY25 Select Board goal to Create a Welcoming, Diverse, and Inclusive Community** by protecting and enhancing the diversity of housing stock via continued focus on affordable housing. The RHSO developed moderate income eligibility guidelines adopted by the Planning Board and Zoning Board of Appeals in recent years and the guidelines were used for a moderate income unit at Mill Run that was created this year.

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

The Concord Housing Authority and Concord Housing Development Corporation are both working with RHSO staff to develop and implement current housing projects. The Select Board has supported the funding of this program through the CPA and Town budget with an Inter-Municipal agreement has been signed by Town Manager Kerry Lafleur with the agreement of the Board. Lastly, Concord's last ten 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 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 share 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 \$33,500 to cover 43.5%% 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 \$77,000. 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 the need for local support . The \$10,000 increase over last year's request will cover the costs associated with the leadership transition period expected to take place at the end of FY26, including additional salary expenses for the dual leadership roles and the training and onboarding of the new RHSO Director. This investment will not only safeguard the continuity of our programs but also strengthen our organizational stability. The cost associated with this transition will be shared across all member communities.

The remaining funds in this account will be used for any "a la carte" services of the program required by the Town (such as assisting with unexpected opportunities to create or support affordable housing).

Feasibility

The most recent Inter-Municipal Agreement between Concord and the other member was signed on July 22nd, 2024. This agreement included a new community, Natick, which increased the list of partner communities to ten. 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, Natick, Sudbury, Wayland, and Westor

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

July 31, 2024

To: John Mangiaratti, Matthew Hanson, Kerry LaFleur, James Malloy, Timothy Higgins, Greg Johnson, Jamie Erikson, Andy Sheehan, Michael McCall, Leon Gaumond, Janet Adachi, Kristen Guichard, Eric Salerno, Megan Zammuto, Elizabeth Hughes, Lee Smith, Keith Bergman, Carol Kowalski, Abby McCabe, Paula Vaughn, Rick Lefferts, Bill Nemser, Steve Silverstein, Amanda Loomis, Adam Burney, Carmine Gentile, Ryan Poteat, Robert Hummel, Imai Aiu, Tom Timko

CC: Jody Kablack, Christine McKenna Lok, Ibrahim Kazibwe, Jenicia Pontes

From: Elizabeth Rust

RE: Regional Housing Services Office – FY24 RHSO Year-end Recap Report

This is the FY24 Year-end Recap Report for the Regional Housing Services Office, the inter-municipal collaboration between the ten towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Natick, Sudbury, Wayland and Weston. Please let me know if you have any comments or questions.

RHSO Administration:

FY24 found the RHSO fully staffed. Our newest team member joined at the start of January: Ibrahim Kazibwe is the backbone of our in-person services for applicants and current owners. Jen Pontes and Christine McKenna Lok have celebrated their one-year anniversaries with RHSO. Jody Kablack has nearly five years with the RHSO and Liz Rust has been steering the ship since RHSO's start in 2011.

We've continued our bi-monthly newsletters ([RHSO Newsletters](#)) highlighting items of general noteworthiness. Comments and suggestions are always welcome.

We held an Advisory Committee meeting in January and the annual Town Leadership meeting in May. The FY25 budget is set, the IMA Amendment signed, and FY26 discussions have started.

Regional Activities:

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

Once again, we held our annual spring post-purchase homeowner session. This year it was held on June 5 and attended by 83 people.

We completed summary infographics for each member town, posting them to our website in the Member Town sections. [See [Acton's](#) for an example.] These mini-housing housing needs assessments bring together the 2020 Census and other current datasets for eight easy-to-read graphical charts for each of the communities on topics such as change in population diversity, income of seniors, households being cost burdened by housing.

SHI, 40B Safe Harbor and Inventory Administration: Managing the SHI inventory is a key component of the RHSO services provided.

SHI Units: A total of 1,481 units have been added to the Subsidized Housing Inventory for the members since joining the RHSO, and 364 in FY24.





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Safe Harbor: Six (60%) of the RHSO communities are in safe harbor through meeting the 10%, and Wayland has a Certified Housing Production Plan (thru 7/13/25).

Housing Production Plan: Six of the RHSO communities have approved Housing Production Plans, 1 expiring in FY25, 1 in FY26, 3 in FY27 and 1 in FY28. Sudbury (as the 7th) is completing their HPP for FY25 approval.

	FY24 SHI Units	Housing Units, 2020	SHI%	+/- 10%	FY24 SHI Changes	FY25 SHI Pipeline	40B Safe Harbor
Acton	738	9,151	8.06%	-178	26 Carlisle Rd (1)	Powder Mill (230)	HPP (6/21/25)
Bedford	993	5,424	18.31%	451	Village at Bedford Woods (4)		10%
Concord	918	7,172	12.80%	201	Main St (2), Millrun (1), 367 Comm Ave (1), NOVO (201)	Forest Ridge (1), 406 OMR (2), Thoreau (216)	10%, HPP (12/20/27)
Lexington	1,354	12,252	11.05%	129	Waterstone (21), 186 Bedford St (13)		10%
Lincoln	298	2,322	12.83%	66			10%
Maynard	425	4,730	8.99%	-48		Maynard Square (26)	HPP (11/16/26)
Natick	1,552	15,563	9.97%	-5	Graystone (3), Stonegate (48), Nouvelle (7)		HPP (6/17/26)
Sudbury	775	6,523	11.88%	123			10%
Wayland	538	5,227	10.29%	16	St Anne's Church (60), West Plain (1)	12 Hammond Road (1)	10%, HPP (5/9/27) certified (7/13/25)
Weston	152	3,999	3.80%	-248	Silver Hill (1)		HPP (9/15/26)
total	7,743	72,363	10.70%	507			

Monitoring:

The monitoring program is a core service of the RHSO with ~7,750 units of SHI rental and ownership restricted housing across the communities. Across the communities, the RHSO monitors 427 ownership units, and 797 rental units.

The MassHousing 40B ownership units have a third-party monitor assigned, and the Sudbury Housing Trust (staffed by the RHSO) is one such monitor, monitoring 69 units across 11 developments, most of which are located in RHSO communities, separated in the table.

On the ownership side, the interest rates continue to be high, which has the effect of significantly decreasing sales prices. Good news for new buyers, disappointing for current owners. We receive many inquiries for resale price values.



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Ownership Units: The ownership monitoring has completed for FY24 with the following steps:

- Self-certifications to each owner: We completed three mailings: October, January and May. We had a lower response rate this year and will focus on this in FY25.
- Review the registry of deeds: Completed for all communities and sent violation letters where needed.
- Review owner mailing address versus town database: Q4
- Provide annual certification reports to EOHLCD (was DHCD): Q4
- Send Welcome Letters to new owners: Sent out 12 letters in January.

6/30/2024	FY24 Self-Declaration					FY23 Self-Declaration
	Sent from RHSO	Sent from SHT	Rec'd	Open	% rec'd	% rec'd
Acton	64	10	65	9	88%	97%
Bedford	51	0	45	6	88%	96%
Concord	74	2	73	3	96%	96%
Lexington	27	0	27	0	100%	100%
Lincoln	52	0	45	7	87%	89%
Maynard	0	6	5	1	83%	83%
Sudbury	9	23	30	2	94%	94%
Wayland	22	0	17	5	77%	82%
Natick	61	0	50	11	82%	
Weston	26	0	21	5	81%	85%
<i>total</i>	<i>386</i>	<i>41</i>	<i>378</i>	<i>49</i>	<i>89%</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.

Resale Summary	FY20	FY21	FY22	FY23	FY24
Acton	1	1		2	
Bedford		2	1*		1
Concord	2	3	2	1	4
Lexington	1			1	
Lincoln	1	3	3	4	2
Maynard					
Natick					3*
Sudbury/SHT	1	2	3	1	1
Wayland		1	2*		
Weston	1	1		1	
	7	13	11	10	8
*Non-RHSO	\$31,231	\$70,982	\$29,222	\$34,755	\$15,586

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 may be used to offset RHSO membership fees or purchase additional hours if the transaction is particularly time-consuming or difficult.

Note: The Natick resales do not include South Natick Hills.

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

Some municipalities (Acton, Bedford, Lexington, and Sudbury) negotiated annual payments with the developers to monitor their large LIP rental properties (nine properties in our service area). We have created a tracker to assist the towns collect \$30,316 annually. **We encourage all municipalities to negotiate an annual monitoring payment to the town for new LIP rentals.**

In general, the rental monitoring review includes:



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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 EOHLC, as required.
7. Follow-up during the year on compliance findings and recommendations, as well as unit changes and other requests.

The HUD Income Limits were published on 4/1/24 and represented a 10% increase. We worked with all member communities and recommended a 5% increase for renewals, and 10% for new tenants. This was accepted by EOHLC and all property managers.

The below table provides the schedule for the rental monitoring.

	Town	Rental Development Name	SHI units	Restricted Units	Subsidy Program	Monitoring
1	Acton	Scattered sites (AHA)	8	8	LIP 40B	Complete FY24
2	Acton	Inn at Robbins Brook	3	3	LIP-LAU	FY25
3	Acton	Avalon	86	22	LIP-40B	Complete FY24
4	Bedford	Village at Concord Road	12	3	LIP 40B	Complete FY24
5	Bedford	Patriot Place	10	7	LIP 40B	Complete FY24
6	Bedford	Village at Taylor Pond	200	50	LIP-LAU	FY25
7	Bedford	Bedford Village	96	96	CPA	Complete FY24
8	Bedford	Avalon at Bedford Center	139	35	Local	FY25
9	Concord	Concord Prescott	350	88	LIP 40B	FY25
10	Concord	Concord Park	0	16	Local	FY25
11	Concord	405 Old Bedford Road (CHA)	4	4	LIP LAU	Complete FY24
12	Concord	Brookside Square	74	8	LIP-LAU	Complete FY24
13	Lexington	Avalon at Lexington Hills	387	97	LIP 40B	In Process/FY25
14	Lexington	Avalon Lexington	198	56	Local	In Process/FY25
15	Lexington	LexHAB Scattered Sites	48	48	various	FY25
16	Lexington	186 Bedford Road	13	4	LIP LAU	New in FY25
17	Lincoln	Commons	30	8	LIP 40B	Complete FY24
18	Lincoln	Oriole Landing	60	15	LIP LAU	Complete FY24
19	Maynard	Halstead Maynard (the Vue)	180	22	LIP LAU	FY25
20	Maynard	Maynard Point, 42 Summer	24	6	LIP 40B	FY25
21	Natick	Natick Avenu	164	17	LIP-LAU	New in FY25
22	Natick	Modera	138	28	40R	New in FY25
23	Sudbury	Willis Lake (SHA)	1	1	LIP-LAU	FY25
24	Sudbury	Avalon	250	63	LIP 40B	FY25
25	Sudbury	Cold Brook Crossing	101	26	40R	Complete FY24
26	Wayland	Alta (River's Edge)	218	55	LIP LAU	Complete FY24
27	Weston	WAHFI: Church, Jones, Pine, Viles	6	6	LIP LAU	Complete FY24
28	Weston	Warren Ave	7	5	LIP 40B	FY25
			2807	797		



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Town-Specific Monitoring

Other monitoring efforts include assisting residents with refinancing, resales, capital improvements, as well as maintaining the inventory with new projects, new owners, and other general updates relating to maintaining compliance with affordable housing restrictions of existing properties.

In Acton: Assisted with discussions on Cherry Ridge. Reviewed Parker Street LIP application working with owner and Town and EOHLC. Working with town on Powder Mill: reviewing revised plans, writing Local Preference justification. Completed monitoring for the Acton Housing Authority LIP units, and Acton Avalon (along with rent approval).

In Bedford: Completed rental monitoring of Patriot Place and rent approvals at Patriot Place and Village at Taylor Pond. Started resale process for the unit at Bedford Meadows (Winterberry) and worked with Habitat on the LIP application for 23 Winterberry.

In Concord: Completed rent approval for Prescott. Worked on the resales at Westvale and Concord Commons, and the refinancing at Elm Brook. Added 367 Commonwealth Ave to the SHI. Worked with the Concord Housing Authority on the Affordable Housing Restriction at Forest Ridge.

In Lexington: Worked with Avalon and LexHAB on rent approvals. Prepared closing documents for Muzzey resale unit 219. Completed 40B audit

In Lincoln: Completed monitoring (including rent approvals) at the Commons and Oriole Landing. Continue marketing and discussions for troubled unit at Minuteman Commons. Started marketing for a moderate-income unit at Battle Road Farm. Completed the tenant recertification for the Housing Commission.

In Maynard: Reviewed and recommended rent approval for Halstead.

In Natick: Nearly completed the buildout of the Natick housing inventory, 19 developments with individual 62 units. Worked on rent approvals for Avenu and Modera.

In Sudbury: Completed the resale at 480 Dutton Road with all its capital work. Assisted Avalon with rent approvals. Started Cold Brook Crossing monitoring. Prepared closing documents for the closing at Grouse Hill for unit 13. Updated the Frost Farm eligibility criteria, and qualified 8 new applicants.

In Wayland: Completed monitoring for Alta Oxbow.

In Weston: Continued resale process for a unit at Highland Meadows. Completed the tenant selection process for the vacancy at Warren Avenue. Added Silver Hill to the SHI. Supported Brook School property manager in applying to renew HAP contract that expires in March 2025 and following up.

HOME Support:

The HOME support category assists participating HOME communities (Bedford, Concord, Lexington, Natick, 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 ~\$2,930,000 since FY13.



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The HOME units that the RHSO monitors are listed below.

	Town	Development Name	HOME Units	Monitoring
1	Bedford	20 Railroad	1	FY25
2	Bedford	447 Concord Road	11	FY24
3	Bedford	Ashby	4	FY24
4	Concord	Thoreau St (CHA)	1	
5	Concord	Peter Bulkeley (CHA)	4	FY23
	Lexington	Douglas House	9	
6	Lexington	561 Mass Ave	1	FY23
7	Lexington	Pine Grove Village	3	FY24
8	Lexington	Keeler Farm	1	FY22
	Natick	6 Plain St	2	
9	Sudbury	Coolidge (I and II)	3	FY22
		TOTAL	40	

In this reporting period the RHSO attended the HOME meetings in February and May, completed the Annual Action Plan, participate in the HOME Consortium ARPA RFP process, as well as:

- Fair Housing: Participated in the bi-monthly status meeting for the Housing Discrimination Testing initiative. To date, 57 tests have been completed across all 13 consortium municipalities, of which 27 are conclusively discriminatory, 20 of which are concentrated in 6 of the communities (including Sudbury and Wayland). The discriminatory tests break out as 17 for source of funds/voucher holder, and 10 are racial. We are planning Section 8 training for property managers in the fall. More information is forthcoming.
- Bedford: Completed two new cases for the Bedford Initial Rental Assistance Program (TBRA).
- Concord: Submitted requisition for HOME admin.
- Lexington: No HOME activity this period.
- Natick: Investigated properties requiring HOME monitoring. Met on assisting with TBRA administration.
- Sudbury: No HOME activity this period.
- Wayland: Drafted the Environmental Review for St. Anns. Completed a new case for the Wayland Rental Assistance Program (TBRA).

Local Support:

This 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.

In Acton: Continued monthly status meetings. Reviewed and commented on the proposed LIP application for Parker Street and had subsequent discussions with the property owner. Discussed Cherry Ridge with Town Staff. Updated the Capital Improvement Application with 2024 Income Limits.

In 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 with updating the application with 2024 Income Limits, preparing one applicant for review. Continued administration of the Bedford Rent Relief Program, for the second round of funding for \$60k, processing 7 new applicants in this reporting period.



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In Concord: Continued monthly status meetings with Town staff, and attended Concord Municipal Affordable Housing Trust meetings. Convened the Concord Housing Roundtable in April. Prepared comments for the NOVO and Residences at Thoreau proposals. Discussed and prepared an estimate for an HPP Amendment. Assisted the Trust and MAPC with regional trust contacts.

Continued assisting the CHDC with the Assabet River Bluff project: For 406 Old Marlboro Road, supporting the CHDC as landlord with property maintenance, utility and other payments, completing an Environmental Review, HQS property inspections, and other landlord functions. For the new construction, supported the issuing of the Planned Residential Development permit; Issued RFPs for development for both Assabet River Homes and Junction Village, for February publication, supporting the site visits and pre-bid conferences, and RFP responses. Processed reimbursements to the Trust and the CPC for expenses. Published sales prices and rents at different AMI levels for developer proposals. Generally assisted the CHDC with staff support by preparing agendas and meeting materials, scheduling and convening meetings. For financial reporting, prepared the Form ABC for the assessors, and the Annual Reports for the CPA and Town. Administered the CHDC Small Grant Program (presenting 5 grant applications in this reporting period, and processing payments. And updating the application for 2024 Income Limits.).

In Lexington: Continued monthly status meetings. Prepared sales prices and rents at different AMI levels for developer proposals. Attended frequent Lexington Municipal Affordable Housing Trust meetings to assist in their efforts, and Town Meeting requests. Started Needs Assessment with assembled working group. Provided comments to the Planning department on submitted development proposals: Piper Road, Meriam Road, 89 Bedford.

In Lincoln: Supported the Lincoln Foundation Small Grant Program application cycle with 2 new applicants. Mailed letters to condo fee recipients.

In Maynard: Continued monthly status meetings. For the Maynard Rent Relief Program: recertified four existing tenants and started the second round of the program with six new tenants (marketing, lottery, eligibility and contracting).

In Natick: Continued monthly status meetings. Wrote Local Preference justification for Stonegate. Met with resident about them leaving their house to the affordable housing trust.

In Sudbury: Provided ownership valuation recommendations to the assessors. Working on the Housing Production Plan by: attending working groups meetings, preparing materials and presenting at public forum, drafting chapters on demographics, housing needs, implementation capabilities, and development constraints.

Supported the Sudbury Housing Trust by attending meetings, preparing financial reports, administering the Small Grant Program by updating the application with 2024 Income Limits, assembling requests and presenting for review (2), preparing award materials and payment request packages (4). Completed the final administration for the Sudbury Rent Relief Program (SRRP). Prepared the Trust Annual Report. Continuing 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:

- Monitoring Agent: Completed monitoring and rent approvals for Cold Brook Crossing. Accepted new monitoring contract for development in Harvard.
- Plainville: Started recertifications.
- Pine Hill in Harvard: Closed one unit, worked on awarding the last three units.
- Village Green in Holliston: Closed one unit, worked on awarding the next unit.



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- Wellington Woods, Medford: Closed on the last 4 units.

In Wayland: Attended periodic status meetings. Provided comments on the MBTA/3A zoning proposal.

In Weston: Continued monthly status meetings and attended HPP Implementation Committee meetings. Supported the Weston Housing Trust with collecting home repair grant applications, compiling applicant packets for Trust review, notifying applicants, gathering signatures, and submitting disbursement requests to Town Finance Office. Met once or twice each month with Habitat for Humanity to help with process of applying for Regulatory Agreement and progressing towards closing and conveyance. Gathered information about affordable housing accounts in Weston and scheduled Town Treasurer's visit to Trust; she recommended a different bank and Money Market account that would generate more interest and the Trust approved. Additionally provided the Weston Housing Trust with staff support by preparing agendas, meeting materials, draft annual report, follow-up emails to meeting attendees; scheduling and convening meetings and volunteers for Weston Marketplace, mentoring new Trustee. Assisted with planning Housing Roundtable, helping with hybrid implementation (in room & online staffing). Researched conservation restrictions on land identified as Trust for possible affordable housing. Met with Planning Board about ADU legislation pending at State House.

For Warren Avenue: Continue financial review including budget, expenses, capital plan snow plowing/shoveling records; defining on-going tenant and management processes. Revising tenant handbook and lease in conjunction with property manager. Collected and reviewed lottery applications for vacant unit, administered lottery. When lottery winner did not pursue a lease, continued to advertise unit vacancy until a qualified tenant was identified. Prepared lease approval request for Trust review, then submitted to EOHLC for their approval of maximum rents for new tenants and the Cost of Living Adjustment formula for lease renewals. Met with town attorney and property manager several times regarding non-payment of rent issue and eventual Notice to Quit.



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FY24 Tracking:

We have finished the year, and the tracking of hours by RHSO member community is shown in the table to the right.

The year ended with most communities close to their budget, except Acton, which is refunded the hours towards their FY25 fee.

Any hours 'owed' at the end of the year are 'refunded, above the '+/-' 10 hours, which is forgiven per policy.

As always, we monitor the hours monthly, and are pleased to provide interim reporting if needed.

FY25 Budget:

	FY25 - BUDGET		
	Total		% of Total
Starting Balance	\$8,577		
Revenue			
Acton	\$37,042	504	10%
Bedford	\$37,942	479	10%
Concord	\$66,933	845	17%
Lexington	\$41,981	530	11%
Lincoln	\$30,337	383	8%
Maynard	\$13,466	170	4%
Natick	\$25,426	321	7%
Sudbury	\$73,269	925	19%
Wayland	\$12,990	164	3%
Weston	\$41,981	530	11%
Total	\$384,247	4,851	100%
Expenses			
Staffing	\$355,465		
Program expenses	\$8,000		
Administrative Cost	\$21,000		
Total Expenses	\$384,465		
Ending Balance	\$8,359		
Billing Rate	\$79.25		

	FY24 Actual	FY24 Budget	Actual v Budget
Acton			
Monitoring	158.25	110.00	48.25
Local Support	156.25	218.18	(61.93)
ACHC	46.50	117.00	(70.50)
Regional Activities	41.80	25.00	16.80
Admin	56.25	25.00	31.25
Total	459.05	495.18	(36.13)
Bedford			
Monitoring	244.75	130.00	114.75
HOME administration	33.00	40.00	(7.00)
Local Support	87.75	137.27	(49.52)
BHP/MAHT	15.50	113.00	(97.50)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	480.05	470.27	9.78
Concord			
Monitoring	300.00	80.00	220.00
HOME administration	24.50	80.00	(55.50)
Local Support	279.50	290.00	(60.50)
CHDC	149.46	275.00	(125.54)
HPP	0.00	29.55	(29.55)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	802.51	804.55	(2.04)
Lexington			
Monitoring	121.25	155.00	(33.75)
HOME administration	54.75	40.00	14.75
Local Support	219.50	250.18	(30.68)
Regional Activities	42.30	25.00	17.30
Admin	55.75	25.00	30.75
Total	493.55	495.18	(1.63)
Lincoln			
Monitoring	203.75	196.00	7.75
Local Support	46.75	73.95	(27.20)
Lincoln Board/MAHT	37.50	60.00	(22.50)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	387.05	379.95	7.10
Maynard			
Monitoring	32.25	40.00	(7.75)
Local Support	35.75	31.06	4.69
Maynard AHT	8.00	44.00	(36.00)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	175.05	165.06	9.99
Natick			
Monitoring	149.25	153.00	(3.75)
HOME administration	8.00	40.00	(32.00)
Local Support	43.00	41.36	1.64
Natick AHT	8.00	25.00	(17.00)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	307.30	309.36	(2.06)
Sudbury			
Monitoring	300.75	85.00	215.75
HOME administration	15.00	40.00	(25.00)
Local Support	76.75	275.00	(198.25)
HPP	215.25	208.74	6.51
Sudbury AHT	452.00	505.00	(53.00)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	1158.80	1163.74	(4.94)
Wayland			
Monitoring	17.50	30.00	(12.50)
HOME administration	28.25	40.00	(11.75)
Local Support	20.75	32.60	(11.85)
Regional Activities	39.80	25.00	14.80
Admin	56.25	25.00	31.25
Total	162.55	152.60	9.95
Weston			
Monitoring	164.75	56.00	108.75
Local Support	216.45	159.10	57.35
Weston AHT	79.50	285.00	(205.50)
Regional Activities	42.80	25.00	17.80
Admin	56.25	25.00	31.25
Total	559.75	550.10	9.65
Totals	4985.66	4986.00	(0.34)






FY26 RHSO CPC Application 9.10.24

Final Audit Report

2024-09-11

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