

Appendix I



**TOWN OF CONCORD
COMMUNITY PRESERVATION COMMITTEE**

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

Application for CPC Funding

Due no later than 12:00 noon on Friday, September 19, 2025

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: \$ 39,000
Amount from Other Funding Sources: \$ 38,000
Total Project Budget: \$ 77,000
(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 * | _____ Architectural plans, site plans, photographs (if appropriate) |
| _____ Map (if applicable) | _____ Copy of IRS determination letter (Non-profit Organizations only)* |
| <input checked="" type="checkbox"/> Narrative * | _____ Completed W-9 Form (Non-profits only)* |
| <input checked="" type="checkbox"/> Selection Criteria and Needs Assessment | _____ Copy of Audit or most recent Financial Information (Non-profits only)* |
| <input checked="" type="checkbox"/> Detailed Project Budget * | _____ Letters of Support (if any) |
| <input checked="" type="checkbox"/> Feasibility Assessment | |
| <input checked="" type="checkbox"/> Statement of Sustainability (if applicable) | |
| <input checked="" type="checkbox"/> Timeline * | |

Project Contact Person*: Alyssa Sandoval
Project Contact Address*: 141 Keyes Road Concord
Project Contact Phone*: 978-318-3217 Email*: asandoval@concordma.gov

Authorized Signature of Applicant*: *Alyssa Sandoval*

Authorized Signature of Property Owner* (if different): _____ * 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 \$39,000 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 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 expanded to ten communities total. 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 have 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. The Town's monitoring responsibilities include the 957 units on the State's Subsidized Housing Inventory (SHI) as well as any locally produced affordable units, including the Prescott and Brookside Square.
- 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 13.34%, an increase from last year's 12.81%. New units that were added this year include Assabet River Homes (2), NOVO 40B (lapsed -201 units) and Residences at Thoreau (237 units).
- 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 properties), 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 worked closely with the Concord Housing Development Corporation (CHDC) and the Concord Municipal Affordable Housing Trust (CMAHT) on the Assabet River Homes development, and the continued support for CHDC efforts and initiatives including administration of the Small Grants Program, as well as the on-going support of the organization's administrative needs. The RHSO has also been providing staff support toward the potential development of workforce housing at 91B Main Street, a state-owned property.
- 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 website (www.rhsohousing.org/) 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 a reduction in hours and total fee from FY26. The successor RHSO Director has been hired and transition underway. FY27 includes a modest number of hours for Elizabeth Rust to continue support for specific municipalities and initiatives.

The total RHSO fee is \$77,000 with \$39,000 requested from CPA through this request, and supplemented by town funds budgeted for FY27 in the amount of \$38,000.

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 -FY2025 Q3 Q4 Recap 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 funding the monitoring and administration of Concord's existing affordable housing stock in addition to assisting 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.

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 eleven 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 fit/fills 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 \$38,000 to cover half 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 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 assisting with unexpected opportunities to create or support affordable housing).

Feasibility

The most recent Inter-Municipal Agreement between Concord and the other members was signed on June 24, 2025. 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.

Statement of Sustainability

As part of any new development or renovation, the RHSO and Town of Concord staff will evaluate inclusion of energy-efficient features to the extent feasible to reduce the cost of utilities for residents with limited incomes.

Outreach Strategy

The RHSO regularly interacts with and gathers feedback from various boards and committees related to affordable housing. On a quarterly basis, the RHSO helps convene and facilitate a housing roundtable with the Concord Municipal Affordable Housing Trust, the Concord Housing Development Corporation, the Concord Housing Authority, the Select Board, and the Community Preservation Committee.

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 Weston

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:

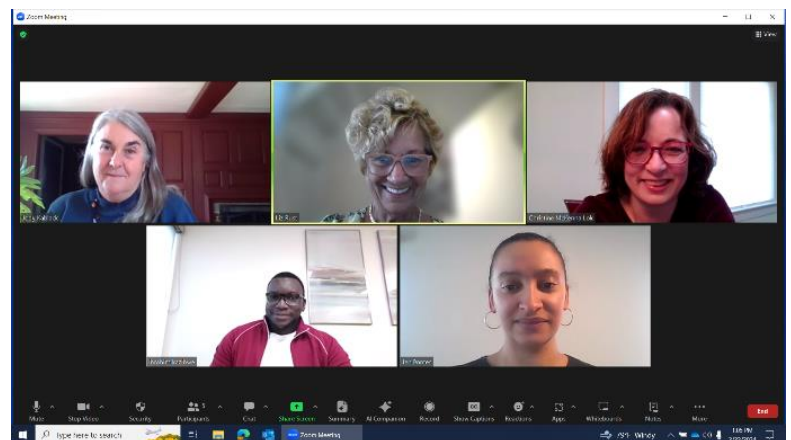
Regional activities provide general housing resources, including training, reports, information and the website.

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 EOHLC (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
<i>*Non-RHSO</i>	\$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 EOHLIC, 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 EOHLIC 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 EOHLIC. 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	229.50	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)



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September 5, 2025

To: John Mangiaratti, Matthew Hanson, Kerry LaFleur, Steve Bartha, Timothy Higgins, Greg Johnson, Jamie Erikson, Andy Sheehan, Michael McCall, Leon Gaumond, Janet Adachi, Nate Ryan, Eric Salerno, Alyssa Sandoval, Elizabeth Hughes, Julie McClure, 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: Kristen Guichard, Jody Kablack, Christine McKenna Lok, Jenicia Pontes

From: Elizabeth Rust

RE: Regional Housing Services Office – FY25 RHSO Recap Report

This is the FY25 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:

The RHSO is pleased to welcome Kristen Guichard as the successor RHSO Director! Kristen has much experience with the RHSO, coming from years of working together in her role as Acton Planning Director. Kristen started in July, and transition is already going well.



We ended the FY25 year in high gear. The FY26 budget is set, the IMA Amendment signed, and already the FY27 discussions have started.

The IMA is a three-year term, ending in FY26, with annual amendments. Invoices were sent out in July, and we have started to receive some funds – thank you Maynard and Lexington!

The calendar year started with an Advisory Committee meeting in January and then annual Town Leadership meeting in May.

We have drafted a preliminary FY27 budget aiming to balance increased rates and workload, while looking to reduce the fee for communities. We will continue refinements through the next 6 months. The RHSO is hiring and plans to have a new housing coordinator on board this fall.

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 16 and attended by 72 people.



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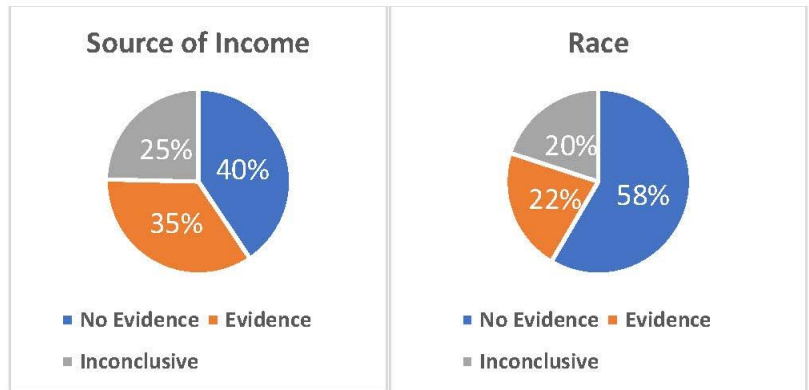
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Fair Housing The WestMetro HOME Consortium has committed to another engagement of **Fair Housing Testing Program** to further investigate levels of discrimination within the communities against renters based on their race or source of income by conducting housing discrimination tests. The publication of the [report](#) marked the culmination of two years of work, and found issues of discrimination in both categories and makes recommendations for enforcement, education and outreach as well as local zoning.



SHI, 40B Safe Harbor and Inventory Administration:

SHI Units: A total of 1,852 units have been added to the Subsidized Housing Inventory for the members since joining the RHSO, and 281 in FY25, and 90 so far in FY26. January started with EOHLIC distributing their biennial SHI reports which the RHSO reconciled. We now have current SHI reports as of August, which are posted on the RHSO website.

Safe Harbor: 8 of the RHSO communities are in safe harbor – 7 through meeting the 10%, and Maynard has a Certified Housing Production Plan (thru 10/1/25).

Housing Production Plan: Seven of the RHSO communities have approved Housing Production Plans, 1 expiring in FY26, 3 in FY27, 1 in FY28 and 1 in FY31. Sudbury is awaiting approval from EOHLIC.

9/1/2025	SHI units	SHI%	+/- 10%	FY26 SHI Pipeline	40B Safe Harbor, HPP (exp Date)
Acton	968	10.58%	53		10%, HPP (7/1/2030)
Bedford	999	18.42%	457	Plank St (56 units, 17 affordable)	10%
Concord	957	13.34%	240	ARH (2, 3), Thoreau (-237), NOVO (201)	10%, HPP (12/20/27)
Lexington	1,356	11.07%	131	LexHAB scattered sites (4, 2), Miriam St (1), 193 Bedford (4)	10%
Lincoln	298	12.83%	66	Commons (11)	10%
Maynard	472	9.98%	-1	1 Summer (2)	HPP (11/16/26) certified (10/1/25)
Natick	1,588	10.204%	32	5 Auburn, 21 Summer (3)	HPP (6/17/26)
Sudbury	775	11.88%	123		10%, HPP Pending approval
Wayland	533	10.20%	11	11 Hammond (1)	10%, HPP (5/9/27)
Weston	168	4.20%	-232	North Av (16), 751 BPR (172)	HPP (9/15/26)
total	8,114	11.21%	878		

Monitoring:

The monitoring program is a core service of the RHSO with ~8,000 units of SHI rental and ownership restricted housing across the communities. Across the communities, the RHSO monitors 436 ownership units, and 805 rental units.

The 2025 Income Limits were released by HUD on April 1, 2025, which triggers annual updates to programs that use those limits (rental assistance, Small Grants) and requests for rent increases by property managers.



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In 2025, 80% AMI the income limits increased by 1.6% (versus 9.9% in 2024), and the 100% AMI increased by 8.1% (versus a decrease of 0.3% in 2024). [HUD's Income Limits](#), which are used in most housing programs for eligibility purposes, are calculated relative to the median family income of each area for throughout the United States. HUD uses median family income data from the 2023 American Community Survey and updated with an estimate of changes in per capita wage growth.

For monitoring, 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.

We received many inquires from owners looking for resale prices of their homes. Interest rates continue to be high, which has the effect of significantly decreasing sales prices. Good news for new buyers, disappointing for current owners.

Ownership Units: The ownership monitoring has completed for FY25:

- Self-certifications to each owner: We completed three mailings: September, January, May
- Review the registry of deeds: Completed for all communities and sent violation letters where needed.
- Sent Welcome Letters to new owners.

9/1/25	FY25 Self-Declaration					FY24
	Sent from RHSO	Sent from SHT	Rec'd	Open	% rec'd	% rec'd
Acton	66	8	66	8	89%	88%
Bedford	54		49	5	91%	88%
Concord	74	2	69	7	91%	96%
Lexington	26		25	1	96%	100%
Lincoln	50		45	5	90%	87%
Maynard	1	5	6	0	100%	83%
Sudbury	11	21	30	2	94%	94%
Wayland	23		18	5	78%	77%
Natick	64		54	10	84%	82%
Weston	25		23	2	92%	81%
<i>total</i>	<i>394</i>	<i>36</i>	<i>385</i>	<i>45</i>	<i>90%</i>	<i>89%</i>

A further analysis of the SHI shows the ownership segment of the affordable units on the SHI, with Lincoln having 50% of their affordable units as ownership, and Maynard and Lexington with 3% and 5% respectively. Most of the affordable SHI units are rental units, as the table below shows.

9/1/2025	SHI units	Market on SHI	Affordable on SHI	Affordable Owner on SHI	Affordable Rental on SHI	% Affordable Owner	% Shi w/o Mkt	Moderate, Other Restricted Units
Acton	968	300	668	73	595	12%	7%	
Bedford	999	400	599	61	538	11%	11%	
Concord	957	534	423	56	367	15%	6%	46
Lexington	1,356	657	699	33	666	5%	6%	36
Lincoln	298	120	178	59	119	50%	8%	6
Maynard	472	195	277	7	270	3%	6%	
Natick	1,588	476	1,112	137	975	14%	7%	
Sudbury	775	297	478	37	441	8%	7%	
Wayland	533	202	331	54	277	19%	6%	
Weston	168	12	156	26	130	20%	4%	1



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	FY25 Resales
Acton	125 Skyline Dr (IP), 3 West Road (IP)
Bedford	19 Winterberry, 54 Loomis St. #2105 (IP), 45 Shawsheen (IP)
Lexington	2 Judges Rd (IP), Muzzey 103, 200, 352, 342
Lincoln	16A North Commons, 46B Indian Camp Lane
Natick *	10-205S Nouvelle Way, 13 Morgan Drive, Unit 308, 11 Thoreau Court Unit 12, 52 Silver Hill Lane #23
Wayland	221 Rice Road
Weston	5 Paine Place, 1 Livermore Lane, 815B Boston Post Rd (IP)
*Non-RHSO	

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.

The RHSO provides these resale services as part of its core monitoring efforts, and the town receives the resale fee associated with the transaction. Many municipalities give these fees to the housing trusts.

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 over 100 units.**

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

The table below provides the schedule for the rental monitoring, with the bolded items completed in this reporting period.



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	Town	Rental Development Name	SHI units	Restricted Units	Monitoring Status
1	Acton	Scattered sites (AHA)	8	8	Cpt FY24 Q3
2	Acton	Inn at Robbins Brook	3	3	Cpt FY25 Q4
3	Acton	Avalon	86	22	Cpt FY24 Q3
4	Bedford	Village at Concord Road	12	3	Cpt FY24 Q2
5	Bedford	Patriot Place	10	7	Cpt FY25 Q1
6	Bedford	Village at Taylor Pond	200	50	In process, FY26 Q1
7	Bedford	Bedford Village	96	96	Cpt FY24 Q1
8	Bedford	Avalon at Bedford Center	139	35	Cpt FY25 Q4
9	Concord	Concord Prescott	350	88	Cpt FY25 Q3
10	Concord	Concord Park	0	16	Cpt FY25 Q4
11	Concord	405 Old Bedford rd (CHA)	4	4	Cpt FY24 Q2
12	Concord	Brookside Square	74	8	Cpt FY24 Q2
13	Lexington	Avalon at Lexington Hills	387	97	Cpt FY25 Q2
14	Lexington	Avalon Lexington	198	56	Cpt FY25 Q2
15	Lexington	LexHAB Scattered Sites	48	48	Cpt FY25 Q3
16	Lexington	186 Bedford Road	13	4	CPT FY25 Q4
17	Lincoln	Commons	30	8	Cpt FY24 Q4
18	Lincoln	Oriole Landing	60	15	Cpt FY24 Q4
19	Maynard	Halstead Maynard	180	22	Cpt FY25 Q2
20	Maynard	Maynard Point, 42 Summer	24	6	Cpt FY25 Q2
21	Natick	Natick Avenu	164	17	CPT FY25 Q4
22	Natick	Modera	138	28	Cpt FY25 Q2
23	Natick	Walnut Place Residences	41	8	Cpt FY25 Q3
24	Sudbury	Willis Lake (SHA)	1	1	CPT FY25 Q4
25	Sudbury	Avalon	250	63	CPT FY25 Q4
26	Sudbury	Cold Brook Crossing	101	26	In process, FY26 Q1
27	Wayland	Alta Oxbow (River's Edge)	218	55	Cpt FY25 Q1
28	Weston	WAHFI Properties	6	6	Cpt FY24 Q4
29	Weston	Warren Ave	7	5	In process, FY26 Q1
			2848	805	

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: Completed rent increase approvals for the 8 LIP units owned by the Acton Housing Authority and Avalon and completed monitoring for the Inn at Robbins Brook. Received conveyance notices for two ownership units at West Road and Skyline Drive. The home at West Road required significant capital improvements and the Town opted to release the restriction. The RHSO marketed and held the lottery for the home on Skyline Drive and is proceeding with an applicant towards a purchase planned for September.

In Bedford: Assisted Habitat with buyer selection for 23 Winterberry by administrating the lottery, drafted Monitoring invoices (447 Concord Road, Avalon), completed monitoring for Avalon at Bedford



Regional Housing Services Office

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Address: 37 Knox Trail, Acton, MA 01720

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Center. Completed rent increase approvals at Patriot Place, Village at Taylor Pond, and Avalon at Bedford Center.

In Concord: After completing the Affordable Housing Restrictions, added the Concord Housing Authority two rental units at 406 Old Marlboro Road, part of Assabet River Homes, to the SHI. Completed monitoring for Concord Park as well as rent increases and monitoring at Concord Prescott.

In Lexington: Prepared closing documents for Muzzey resale unit 342. Worked with Town and Town Counsel to complete Muzzey residency requirements, specifically units held by Trusts. Completed research into historical Muzzey capital improvement credit for roof. Obtained owner commitment to keep Katahdin as rental, for purposes of continued eligibility for the SHI. Completed monitoring for LexHAB Scattered Sites and monitoring for 186 Bedford Road. Completed rent increase approvals for both Avalon properties and 186 Bedford Street. The RHSO marketed and held the lottery for a home at Pine Grove and is proceeding with an applicant towards signing a Purchase and Sale agreement. Added 4 units to the SHI for LexHAB properties.

In Lincoln: Completed the recertifications for the 7 Lincoln Commission owned properties and assisted with policy revision discussions. Completed the HOME Monitoring for Sunnyside.

In Maynard: Reviewed and recommended rent increase approval for Halstead Maynard.

In Natick: Completed monitoring and rent increase approvals for Natick Avenu, monitoring for Walnut Place Residences and rent increases for Natick Modera. Added the 5 Auburn units to the SHI, bringing Natick over the 10% threshold.

In Sudbury: Completed monitoring for Sudbury Housing Authority LIP unit and completed both monitoring and rent increase approval for Avalon. Prepared closing documents for the closing at Grouse Hill for units 34 and 17. Qualified 10 new applicants at Frost Farm.

In Wayland: Completed rent increases for Alta Oxbow. Received conveyance notices for a home at the Covered Bridge condominium, completed marketing and the lottery and assisted the buyer through the closing in July 2025.

In Weston: Completed the resale process for 1 Livermore Lane at Dickson Meadows. Added North Ave to the SHI.

HOME Support:

The HOME support category assists the six 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 ~\$2,950,000 since FY13.

In this reporting period, the RHSO completed the HOME Annual Action plans, the final piece of the 5-year Consolidated Plan effort.

The HOME units that the RHSO monitors are listed below.



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	Town	Development Name	HOME Units	Monitoring
1	Bedford	20 Railroad	1	Completed Q4 FY25
2	Bedford	447 Concord Road	11	Completed Q4 FY23
3	Bedford	Ashby	4	Completed Q2 FY25
4	Concord	Thoreau St (CHA)	1	Completed Q3 FY22
5	Concord	Peter Bulkeley (CHA)	4	Completed Q4 FY22
6	Lexington	Douglas House	9	
7	Lexington	561 Mass Ave	1	Completed Q3 FY24
9	Lexington	Pine Grove Village	3	Completed Q3 FY25
10	Lexington	Keeler Farm	1	
11	Lincoln	30 Sunnyside	1	Completed Q3 FY25
12	Natick	6 Plain St	2	
13	Sudbury	Coolidge (I and II)	3	Completed Q3 FY22
		TOTAL	41	

- Bedford: Completed monitoring for 20 Railroad. Completed sub-recipient agreement for FY25. Requisitioned FY24 HOME Admin funds.
- Concord: Completed sub-recipient agreement for FY25. Requisitioned FY24 HOME Admin funds.
- Lexington: Completed monitoring for Pine Grove. Completed sub-recipient agreement for FY25. Requisitioned FY24 HOME Admin funds.
- Natick: Continued to prepare requisitions for TBRA applicants, and process new applications. Completed sub-recipient agreement for FY25.
- Sudbury: Completed sub-recipient agreement for FY25. Requisitioned FY24 HOME Admin funds.
- Wayland: St Ann’s commitment pending completion of environmental review. Completed sub-recipient agreement for FY25. Requisitioned FY24 HOME Admin funds.

Local Support:

This local support category enables each municipality to have 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. Supported completion of the 2025 HPP by preparing the needs assessment and drafting the environmental constraints, and assisting with Select Board adoption and submission, and subsequent approval, by EOHLIC. Supported the innovative Housing For All zoning initiative by providing financial analysis assistance.

In Bedford: Continued monthly status meetings. Supported the Small Grant Program with preparing one application for review. Revised the guidelines for the Bedford Rent Relief and continued program administration with 7 new applicants in this reporting period and processing benefits for 7 tenants monthly.

In Concord: Continued monthly status meetings with Town staff and attended Concord Municipal Affordable Housing Trust meetings. Convened one quarterly Concord Housing Roundtable meeting. Supported housing-related articles for town meeting. Prepared 2025 sales prices and rents using the 2025 income limits for different AMI levels, and unit types and sizes. Prepared Local Preference justification for the 40B NOVO development. For 91B Main Street, the RHSO revised the conceptual



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plan and distributed it for general review and discussion. Completed the data analysis for the Concord HPP Informational Update intended to support the MCI-Concord re-imaging efforts.

Continued assisting the CHDC with the Assabet River Bluff project: Most efforts were in support of the closing on June 4, 2025 which consisted of conveying the two apartments at 406 Old Marlboro Road to the Concord Housing Authority complete with the agreed-upon renovations completed, establishment of the Assabet River Homes condominium on Rothermel Place, signing leases with Habitat for Humanity of Greater Lowell for three lots, executing an extensive Land Disposition Agreement between the parties, facilitating payment to Habitat and submitting reimbursement requests to the CPC for the all the pre-development expenses, totaling \$257,000. Post-closing activities included transferring the leases from the CHDC to the CHA, continuing to work with Habitat on construction oversight and completion of the LIP Application. Celebrated the efforts with groundbreaking and a social gathering.



Generally assisted the CHDC with staff support by preparing agendas, minutes and meeting materials, scheduling and convening meetings, preparing the Annual Report for the town. For financial reporting, submitted the Form ABC to the assessors. Administered the CHDC Small Grant Program presenting 7 grant applications in this reporting period, processing the awards and processing payments. Continued to assist the CHDC with exploring their Buy-Down Program with hypothetical proformas and narratives.

In Lexington: Continued monthly status meetings. Attended Lexington Municipal Affordable Housing Trust meetings to assist in their efforts and supported Town Meeting requests. Completed Needs Assessment with assembled working group. Provided comments to the Planning department on submitted development proposals: 7 Hartwell, 17 Hartwell, 189 Bedford St. Prepared 2025 sales prices and rents using the 2025 income limits for different AMI levels, and unit types and sizes.

In Lincoln: Revised the Lincoln Foundation Small Grant Program application to target the program as intended and completed outreach to Battle Road Farm owners. Attended the Lincoln Housing Coalition quarterly meetings as requested.

In Maynard: Continued monthly status meetings. Discussions continue on reaching safe harbor, including assisting with HPP certification. Continued administration of the Maynard Rent Relief Program, where the Maynard Affordable Housing Trust has allocated \$288,000 to provide assistance to selected tenants for 3 years each.

- 2023 funding: 4 applicants in their 3rd year, up in June 2026
- 2024 funding: 6 applicants in their 2nd year, up in June 2027
- 2025 funding: 6 applicants in their 1st year, up in June 2028

In Natick: Continued monthly status meetings. Reviewed LIP Local Action Unit process with developers with upcoming developments. Assisted the town with the LIP LAU process and review for the eight (8) developments permitted with an affordable component, including 23 Willow, 21 Summer, Natick Corner (69 East Central), Union Place, and Stonegate, including reviewing LIP LAU applications, Regulatory Agreements, and preparation of Local Preference justification (Natick Corner).

In Sudbury: Assisted in the completion of the Housing Production Plan by assisting in review and revisions.



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Supported the Sudbury Housing Trust by attending meetings, preparing financial reports, Town annual report, administering the Small Grant Program by assembling requests and presenting for review (3), preparing award materials and payment request packages (4). Continuing the administration of Sudbury's Mortgage Assistance Program using state subsidy by making revisions to the program guidelines and processing 4 applicants.

In addition, under the Sudbury Trust umbrella, the RHSO performed lottery and monitoring services for other entities in the region, as follows:

- Lexington: Accepted two new contracts, started marketing Mariam Steet, completed the LIP Application process for 193 Bedford St.
- Ipswich: Completed marketing, lottery, and closed the only unit in the development.
- Pine Hill in Harvard: Closed one unit (9A), with two remaining.
- Village Green in Holliston: Closed unit (2 Sawyer), with last unit closed in August.
- Sherborn: closed one unit at Leland Farm.
- Westwood: Accepted three resale units in Westwood, and started the review process

In Wayland: Attended quarterly status meeting. Participated in Shared Living discussion related to 212 Cochituate in February 2025 following presentation by non-profit.

In Weston: Continued monthly status meetings and attended HPP Implementation Committee meetings.

Weston Housing Trust: Supported the Weston Housing Trust in updating guidelines for annual home repair grants program for deed-restricted homes, providing outreach to owners, collecting applications, reviewing them and following up for completeness, and summarizing them for Housing Trust review. Communicated regularly with Habitat for Humanity project manager and fundraiser for 1-11 Wellesley Street, including inviting them to Trust meetings; arranged for Trust attorney to bring closing documents to Trustees for approval. Additionally provided staff support to the Weston Housing Trust by polling for meeting times, reserving meeting space, preparing agendas and meeting materials, drafting minutes, following up with town staff.

For Warren Avenue: Toured property with town's tree service for estimate, with town conservation department to investigate sick trees and develop remediation plan for replacing trees that must come down, with DPW to identify right of way and requests for Eversource arborist. Submitted paperwork to the conservation department for approval of that work. Received monthly updates from the property manager about rent receipts.



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FY25 Actuals and Tracking:

We have completed the tracking of hours for FY25. Over the year, Lexington purchased additional hours and a refund was given to Acton. Any hours 'owed' at the end of the year are 'refunded, above the '+/-' 10 hours, which is forgiven per policy.

	FY25 Actual	FY25 Budget	Actual v Annualized Budget
Acton	414	504	(90)
Bedford	485	479	6
Concord	852	845	7
Lexington	613	610	3
Lincoln	390	383	7
Maynard	174	170	4
Natick	327	321	6
Sudbury	915	925	(10)
Wayland	172	164	8
Weston	538	530	8