



# Town of Sudbury

Community Preservation Committee

<http://www.sudbury.ma.us>  
email: [cpc@sudbury.ma.us](mailto:cpc@sudbury.ma.us)

## PROJECT SUBMISSION FORM

Submitter:

Submission Date:

Group or Committee Affiliation (if any):

Submitter's address :

Purpose (please select all that apply):

- Open Space
- Community Housing
- Historic
- Recreation

Submitter's email & phone number:

Project Manager's email & phone number:

Project Name:

Project Description:

Costs:

<b>Fiscal Year</b>	<b>Total Project Cost</b>	<b>CPC Funds Requested</b>	<b>Other Funding Sources (amount and source)</b>
2021			
2022			
2023			
2024			
2025			
<b>Total</b>			

How does this project meet the General Criteria and Category Specific Criteria for CPC projects (see attached)?

Does this project fall within the jurisdiction or interest of other Town Boards, Committees or Departments? If so, please list the boards, committees or departments, whether applications and/or presentations have been made, and what input or recommendations have been given.

For Community Preservation Committee Use:

Form received on: \_\_\_\_\_

Project presented to CPC on: \_\_\_\_\_

Reviewed by: \_\_\_\_\_

Determination: \_\_\_\_\_

## PROJECT DESCRIPTION

This CPA application is a request for a portion (\$30,000) of the Town of Sudbury's Regional Housing Services Office (RHSO) membership fee to support Town housing activities in FY2021. This is the same amount as prior years.

The Town of Sudbury's housing activities are implemented through a number of organizations: the Sudbury Planning and Community Development Department, the Sudbury Housing Trust, and the Sudbury Housing Authority (SHA). The Planning and Community Development Department, and Housing Authority are staffed by employees funded from their respective operating budgets. The Sudbury Housing Trust is supported by staff, committee members, consultants, and the RHSO, of which Sudbury is a founding member.

Sudbury has funded its membership fee in the RHSO from both CPA funds and Trust funds from its start in FY2012. The Town's portion of the RHSO fee has been submitted and appropriated as a separate article since 2018.

A key piece for the RHSO funding is that the CPA funds support housing activities for the Town, and separately the Trust funds support housing activities for the Trust. These are different activities, though all related to housing.

### Town Housing Activities (funded by CPA)

There are a number of housing activities performed by the RHSO for the benefit of the Town, as listed below. The Town housing activities center around the support and preservation of the affordable housing in Sudbury:

- Incentive Senior Development (ISD) Support: Calculate Frost Farm annual eligibility requirements, review applicant and determine eligibility, prepare Grouse Hill Resale closing documents, inventory Grouse Hill units and propose a Capital Improvement Policy, and provide resale support.
- Ownership Monitoring: The Town is the Monitoring Agent for all deed restricted ownership units. This involves annual self-certifications, registry review, and approvals for refinancing.
- Annual Assessment Valuations: Provide valuations for the deed restricted properties to the Town Assessor.
- Local Initiative Program (LIP) Rental Monitoring: Review Avalon leasing for compliance with the marketing plan, review compliance with Regulatory Agreement, and prepare certification to the Department of Housing and Community Development for LIP rental unit/s –including one SHA unit, and all the Avalon units.
- Inventory Management: Maintain housing inventory and provide estimates for 2021 Subsidized Housing Inventory (SHI) projections, recently completed and posted to website, presented to Planning Board and Zoning Board of Appeals.

- HOME Program: The administrative work includes annual action plans, 5-year consolidated plans, fair housing reports and programs, and quarterly meetings and participation and monitoring of the Coolidge units.
- General Support: There are specific items that come forward throughout the year.

As noted, these are different than the housing activities performed by the RHSO for the benefit of the Trust. The Trust activities are listed below, though this application does NOT request funding for them:

Trust Housing Activities (not funded by CPA)

- Small Grants: Administer Trust Small Grants Program including application revision, applicant assistance, award grants based on Trust vote, and follow-up as required.
- Home Preservation: Assist Trust in home selection, repairs, closing, and on-going support.
- Maynard Road: Assist Trust in program oversight.
- Lottery Agent Services: Perform lottery agent services for the Trust including marketing and outreach, applicant eligibility, lottery administration, closing, and lease-up.
- Trust Support: Meeting support including agenda packets, presentations, and memos as directed.

**ENDORSEMENT, SUPPORT, OR OTHER RECOMMENDATION BY OTHER TOWN BOARDS, COMMITTEES, AND DEPARTMENTS**

The following Committees, Boards, Departments, and organizations all have a vested interest in supporting and maintaining the affordable housing in Sudbury:

- Planning and Community Development Department
- Planning Board
- Zoning Board of Appeals

**RELEVANCE TO CPC CRITERIA**

The proposal meets the following General Criteria for eligibility:

- Provides support directly to individuals and families who are eligible for community housing, or to entities that own, operate, and manage housing for the purposes of making housing affordable;
- Supports maintaining the goal of 10% affordability by monitoring, inventory management, and other support services;
- Continues to promote economic diversity through the administration of the program; and
- Assists the Planning and Community Development Department in allowing the Housing Production Plan to be carried out in a consistent and thoughtful manner.

## **ADDITIONAL CONSIDERATIONS**

This project demonstrates practicality, feasibility, and urgency:

- The proposed project is one that works economically due to the expertise provided by well-qualified staff. Without the monies allocated to the Town the following would have to be considered by the Town:
  - o Inability to maintain compliance with the affordable housing regulatory agreements and requirements.
  - o Leaving a department (Planning and Community Development) with a sizable workload to staff who are unqualified to assist and manage such matters.
  - o Hiring at a nominal rate a part/full-time staff person at a competitive rate well beyond the 10% allocation of CPA funds.

This proposal demonstrates the project can be implanted expeditiously and within budget:

- The costs associated with the proposed project provide wide-spread opportunities for those in need of Sudbury's affordable housing options and always done within budget.

This proposal produces an advantageous cost/benefit value:

- This project was created nearly a decade ago to assist the Town in carrying out measures for the purpose of making housing affordable throughout the Town of Sudbury and to support the existing affordable housing stock.
- The RHSO was created in Sudbury as a cost-effective regional solution for administrative housing activities.



# Regional Housing Services Office

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

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Phone: (978) 287-1092

July 30, 2019

To: John Mangiaratti, Sarah Stanton, Kate Hodges, James Malloy, Melissa Murphy-Rodrigues, Louise Miller, Leon Gaumond, Roland Bartl, Nancy Tavernier, Kristen Guichard, Robert Hummel, Michael Rosen, Marcia Rasmussen, Lee Smith, Jerry Evans, Carol Kowalski, Adam Duchesneau, Patricia Brown, Cynthia Howe, Elizabeth Doucette, Sarkis Sarkisian, Imaikalani Aiu, Sarah Rhatigan  
CC: Jody Kablack, Lara Plaskon, Liz Valenta  
From: Elizabeth Rust  
RE: Regional Housing Services Office – FY19 Q4 Status Report

This is the status report for activity from 4/1/2019 through 6/30/19 (FY19 Q4) for Regional Housing Services Office, an inter-municipal collaboration between Acton, Bedford, Burlington, Concord, Lexington, Sudbury, Wayland and Weston. Please let me know if you have any comments or questions.

### **RHSO Program Administration:**

Fiscal year FY19 has ended, the eighth full fiscal year of operation.

As part of closing the fiscal year, any true-up of FY19 hours is completed, where communities may purchase additional hours (Sudbury and Weston), or refunds are made (Bedford and Burlington), in some cases applying the amounts towards the FY20 invoices. The final hours recap is included at the end of the report.



The RHSO, like any organization, has transitions. Burlington has withdrawn, and Lincoln is planning to join mid-year, perhaps in the next quarter. On the staff side, Dan Gaulin has retired and Jody Kablack has started. Jody comes to the RHSO from many years of planning experience in Sudbury, and will bring new depth to our services.

The FY20 IMA Amendment was distributed and has been signed by all communities, with the RHSO making brief presentations at four Select Board meetings.

### **Regional Activities:**

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

The RHSO Leadership, comprised of Town Managers and Administrators, met in May for the annual program review. The Advisory Committee met in June to approve Lincoln joining and to discuss the Community Waitlist Program.

The RHSO presented the regional housing model at the June 2019 Housing Institute sponsored by MassHousing Partnership and there continues to be strong interest across the state on replicating this model in some fashion.



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The website - [RHSOhousing.org](http://RHSOhousing.org) – continues to be a helpful and useful resource, annual statistics to the right.

The website has inventory and property information for the member towns, services for current residents, and listings of properties for new residents with contact information for people to contact directly. We have some enhancements planned for FY20, and welcome any ideas from the RHSO client community.



We continue to explore offering a RHSO Community Waitlist Program, and plan to present the project for approval to the Advisory Committee in October.

We have drafted the RHSO FY20 workplan, and included homeowner training for Q4 as well as other shared items.

## **SHI and Inventory Administration**

Managing the SHI inventory is a key component of the RHSO services provided. A total of 1053 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO.

We have continued to work closely with Acton, Sudbury and Wayland to estimate and project the SHI over the next 2, 5 and 10 years.

As 2020 approaches, communities are encouraged to review the annual Housing Unit Review Summary report from UMass Donahue distributed in October. This report shows what information is being aggregated into the Census, and is the place where tear downs can adequately be reported. It previews the 2020 SHI denominator.

	SHI Units	Housing Units	% Subsidized	+/- 10%	FY19 SHI Change	FY19 SHI Changes	FY20+ Pipeline
Acton	571	8,475	6.74%	-277	3	Prospect st (1), Main St (2)	327 Units: Powder Mill (230), PO Crossing (3), Mass Ave (-1), Avalon (86), School St (2)
Bedford	974	5,322	18.30%	442			13 Units: Evergreen (3), Village at Bedford Woods (6), Pine Hill (4)
Burlington	1,283	9,627	13.33%	320	2	Simonds Park (2)	
Concord	721	6,852	10.52%	36			88 Units: Junction Village (83), Black Birch II (2 non-SHI), Gerow (1), 930 Main St (2)
Lexington	1,327	11,946	11.11%	132	-1	Manor House (6), DMH (-7),	4 Units: Wright Farm (1), Jefferson Drive (3)



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Sudbury	664	5,921	11.21%	72			
Wayland	317	4,957	6.39%	-179	63	Covered Bridge (3), Cascade (60)	14 Units: 11 Hammond (1), Michael Road (1), Windsor Place (12)
Weston	151	3,952	3.82%	-244	-16	Village at Silver Hill (-2), Kendal Village (-16), Warren Ave (2)	530 Units??: 104 BPR (150?), Mill Creek/Moderna (180), South Av (200?)
total	6,008	57,052	10.53%	303	51		

## **Monitoring:**

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

**Ownership Units:** For the deed restricted ownership units, the annual monitoring review consists of:

- Review the registry of deeds for any activity.
  - Complete
- Review owner mailing address versus town database.
  - Complete
- Self-certifications to each owner, 3 mailings
  - Complete
- Review on-line sites for rentals
  - Complete
- Provide annual certification reports to DHCD
  - Complete
- Provide Welcome Letters to new owners
  - Quarterly: Sent 2 in May (Acton, Bedford)

6/30/2019	FY19 Self-Declaration			
	Sent	Rec'd	Open	% rec'd
Acton	59	56	3	95%
Bedford	54	50	4	93%
Burlington	24	21	3	88%
Concord	73	70	3	96%
Lexington	25	25	0	100%
Sudbury	36	35	1	97%
Wayland	36	33	3	92%
Weston	27	25	2	93%
<i>total</i>	<i>334</i>	<i>315</i>	<i>19</i>	<i>94%</i>

The ownership monitoring process establishes clear communication with the owners documenting their obligations, as well as provides a contact for on-going questions. The RHSO has received a 94%-96% response rate since FY14.

**Rental Projects:** The RHSO monitors Local Initiative Program (LIP) rental units on behalf on the member communities, as required by the DHCD Regulatory Agreement. There are 18 rental projects in the RHSO service area where the RHSO assists the Towns with their monitoring responsibility.

The full monitoring review includes:

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



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	Town	Rental Development Name	SHI units	Subsidy Program	FY19 Status
1	Acton	Scattered sites (AHA)	8	LIP 40B	FY19, FY21
2	Acton	Inn at Robbins Brook	3	LIP-LAU	Final Review
3	Bedford	Village at Concord Road	12	LIP 40B	Complete
4	Bedford	Patriot Place	10	LIP 40B	Delayed
5	Bedford	Village at Taylor Pond	200	LIP-LAU	Complete
6	Concord	Concord Mews	350	LIP 40B	Complete
7	Concord	Concord Park	16	Local	Complete
8	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	FY18, FY20
9	Concord	Brookside Square	8	LIP-LAU	FY20
10	Concord	Warner Woods	80	MH NEF	Complete
11	Lexington	Avalon at Lexington Hills	97	LIP 40B	Complete
12	Lexington	Avalon Lexington	56	Local	Complete
13	Lexington	LexHAB Scattered Sites	48	various	Complete
14	Sudbury	Willis Lake (SHA)	1	LIP-LAU	FY18, FY20
15	Sudbury	Avalon	250	LIP 40B	Complete, Full review FY20
16	Wayland	Residences At Wayland Center	12	LIP-LAU	Complete
17	Weston	Church, Jones, Pine, Viles	6	LIP LAU	Complete
18	Weston	Warren Ave	5	LIP 40B	Complete
			1166		

## Town-Specific Monitoring

Other monitoring efforts include assisting residents with refinancing as well as maintaining the inventory with new projects, new owners, and other general updates.

In Acton: Supported the monitoring efforts at Anthem Village/Martin St with two more affordable unit closings, reviewing three requests for capital improvements, and recommending approval for another buyer, supported the sale of the foreclosure unit and release of the restriction, started marketing a resale unit in Acton, reviewed Inn at Robbins ownership transfer, explored impact of income limit increases on rents at Old High School,

In Bedford: Recommended 2019 rent approvals for Village at Taylor Pond and Village at Concord Road, recommended support for increased Income Averaging LIHTC units at Bedford Village, continued corresponding with owner of Patriot Place with escalation, confirmed the status of the Bedford Housing Trust note to the Bedford Veterans Quarters,

In Burlington: Recommended 2019 rent approvals for The Reserve.

In Concord: Recommended 2019 rent approvals for Concord Mews, Continued to work with condominium on potential mediation, completed an Affirmative Fair Housing and Marketing Plan for the CHA in anticipation of an upcoming vacancy, started marketing a resale unit in Concord .

In Lexington: Completed assistance to LexHAB for cost certification for Fairview, assisted LexHAB with 2019 annual report and rent approvals as well as the compliance process for their moderate income ownership unit.





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In Sudbury: Recommended 2019 rent approvals for Avalon, assisted the Town with getting the Avalon monitoring fee paid, calculated resale price for restricted owner at Carriage Lane.

In Wayland: Supported the town's efforts for cost certification review for Wayland Commons and Wayland Gardens.

In Weston: Completed the resale unit at Highland Meadows with a June closing, recommended approval for a refinancing at South Ave.

## **HOME Support:**

The activities in the HOME support category assist participating HOME communities (Bedford, Concord, Lexington, Sudbury and Wayland) commit and expend their available Program funds, develop HOME funded programs, as well as completing their administrative requirements. To date, the RHSO has assisted the member communities commit \$1,670,000 since FY13.

In this reporting period the RHSO assisted with approvals, and submission of the new annual Sub-recipient Agreements, requisitioned HOME admin funds, and attended the quarterly HOME meeting in May, as well as:

- Consolidated Plan: The HOME 5 Year FY21-FY25 Consolidated Plan provides a strategic look at the community's need and targets HOME projects to address that need. Annual plans then map to the 5-year goals set out. Newton has laid out a segmented approach to the effort, with the below steps and deliverables. The RHSO will work with each community, and leverage materials and data as applicable.
  - Citizen Participation Plan – Prepared initial materials in preparation for the August deliverable.
  - Needs Assessment/Market Analysis – September/October
  - Strategic Plan – November
  - FY21 Annual Action Plan - January
- Bedford: Continued work on Bedford Housing Authority Ashby place project amendment to include additional roofing work, adding additional funds unused FY19 HOME funds to the project (~\$19k), provided HOME utility schedule to 447 Concord Road, .
- Concord: No project activity this period.
- Lexington: Completed the initial commitment process for Pine Grove, and will work towards adding the FY20 funds to the project.
- Sudbury: Supported the closing for The Coolidge Phase II HOME award for \$178,203.
- Wayland: Continued discussions on implementing a Tenant Based Rental Assistance Program (TBRA) using HOME funds.

## **Local Support:**

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

Acton: Continued monthly meetings with town and followed up as needed.

Bedford: Provided the assessors with 2019 restricted values, assisted the town and developer with the Regulatory Agreement for Pine Hill Crossing.

Burlington: Provided information on municipal affordable housing trusts.



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Concord: Provided the assessors with 2019 restricted values, supported related activities for Town Meeting articles, supported recruiting to CHDC and new housing trust task force, received unfortunate news that Junction Village did not get state funding awards this year, continued analysis on new project to provide an enhanced housing inventory, assisted the CHDC by preparing agendas, packets and minutes, administering the Small Grant Program, obtained new Directors and Officer's insurance policy, and prepared to purchase the property at 930 Main Street working with Habitat, CPC/Town, and the Concord Housing Foundation.

Lexington: Calculated the 2019 restricted values for the assessors, provided comments on the permit for 186 Bedford Street, suggestions for restricted moderate income unit standards, and updated the Town and LexHAB on the next steps for Wright Farm 40B.

Sudbury: Calculated the 2019 restricted values for the assessors, for The Coolidge Phase 2, finalized the CPA Grant Agreement for use by the CPC, assisted with the complex closing, and completed payment for the Sudbury Housing Trust funds. For Grouse Hill, provided resale price calculations for four units, and closing documents for two units, reviewed applications and recommended approval for two applicants at Frost Farm. Supported the Sudbury Housing Trust by: preparing agendas, packets and attending monthly meetings, supporting the Home Preservation and Small Grant Program by approving invoices for awarded funds, and assisting with the repairs at one particular unit. In addition, the RHSO performed lottery and resale services for other entities in the region under the Sudbury Trust umbrella, as follows:

- Completed LIP applications/marketing plans for Sherborn, Mansfield, Hopkinton
- Started tenant recertifications for Plainville
- Started marketing at Lexington Jefferson Drive and Villages at Sherborn
- Supported closings for Bedford Evergreen Meadows, Harvard Trail Ridge.

Wayland: Calculated the 2019 restricted values for the assessors, continued definition of affordable housing timeline and process for River's Edge DHCD LIP process and SHI.

Weston: Provided the assessors with 2019 restricted values, presented a 40B primer during a public meeting information session on a proposed 40B development. Continued to work with the Elderly Housing Committee on adding the additional units at the Brook School Apartments to the SHI through the LIP/LAU application process. Assisted the Weston Affordable Housing Trust with its projects and programs, including: preparing meeting agendas and packets, implemented a second round of the Home Repair Grant (six applications were submitted), continued support for the Affordable Home Ownership Opportunity Fund through the development of a RFP to convey 0 Wellesley to a developer for affordable housing on the site; assisted in preparation of comment letters to selectman for two 40B proposals, and assisted in updating the rent policy for the Warren Avenue apartments.



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## **FY19 Tracking and FY20 RHSO Budget:**

The FY19 final hours are shown below.

	YTD Actual	Annualized Budget	Difference
Acton	329.00	320.00	9.00
Bedford	451.50	445.00	6.50
Burlington	125.50	130.00	(4.50)
Concord	496.00	500.00	(4.00)
Lexington	394.50	390.00	4.50
Sudbury	874.50	880.00	(5.50)
Wayland	211.50	215.00	(3.50)
Weston	412.00	405.00	7.00
	3,294.50	3,285.00	9.50

The FY20 approved budget is shown below.

RHSO FY20 - Approved Budget				
	Amount	Current Hours	% of Total	Comments
Starting Balance	\$0			
<b>Revenue</b>				
Acton	\$36,862	470	15%	Increased hours for (part of) HPP
Bedford	\$31,372	400	13%	Reduced hours for less support
Concord	\$39,214	500	16%	Same hours as FY19
Lexington	\$29,803	380	12%	Same fee as FY19
Sudbury	\$65,488	835	26%	Variable for lottery work
Wayland	\$15,294	195	6%	Fine tuned level of support
Weston	\$30,666	391	12%	Fine tuned level of support
<b>Total</b>	\$248,698	3,171	100%	
<b>Expenses</b>				
Staffing	\$219,698	\$69.28		
Program expenses	\$5,000			
One Time	\$2,000			
Administrative Cost	\$20,000			
<b>Total Expenses</b>	\$246,698			
Ending Balance	\$2,000			
Billing Rate	\$78.43			