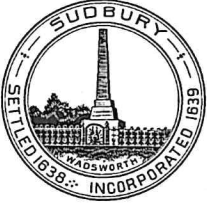


RECEIVED
JUL 18 2024

BY: R. Poteat



Town of Sudbury

Community Preservation Committee

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Sudbury, MA 01776
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Fax: 978-639-3314
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PROJECT SUBMISSION FORM

Applicant: Ryan Poteat

Submission Date:

July 18th, 2024

Group or Committee Affiliation (if any): Sudbury Housing Trust

Applicant Address: Flynn Building - Attn: Planning Department
278 Old Sudbury Road
Sudbury, MA 01776

Purpose (please select all that apply):

Applicant Email: PoteatR@Sudbury.ma.us

- Open Space & Recreation
- Community Housing
- Historic Resource

Applicant Phone: 978-639-3388

Project Manager Email: PoteatR@Sudbury.ma.us

Project Manager Phone: 978-639-3387

Project Name: Regional Housing Services Office Membership Fee - FY2026

Project Description: This proposal requests the Town's portion of the FY2025 Regional Housing Services Office (RHSO) membership

Costs:

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (Amount and Source)
2025	\$85,000	\$43,000	\$42,000 (Sudbury Housing Trust)
2026			
2027			
2028			
2029			
Total			

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

*Please see the attached documents.

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

The Sudbury Housing Trust is supportive of this application and has agreed to commit the remaining cost of the yearly membership fee for FY2026. The Planning and Community Development Department is also supportive of this application.

For Community Preservation Committee Use:

Form Received On: 7-18-2024

Project Presented to CPC On: _____

Reviewed By: Ryan Poteat

Determination: _____

PROJECT DESCRIPTION

This Community Preservation Act (CPA) funding application is a request for a portion (\$43,000) of the Town of Sudbury's Regional Housing Services Office (RHSO) membership fee to support Town housing activities in FY2026.

FY2026 will see a one-year increase of \$10,000 to each community representing a temporary increase for a one-time adjustment related to staffing/leadership transition.

The RHSO Director plans to retire as Director June 30, 2026. To ensure a smooth and uninterrupted continuation of the RHSO, we are proposing a strategic transition plan that involves overlapping the tenure of the new RHSO Director with that of the current one for almost a full year, as co-Directors. This overlap, occurring in Fiscal Year 2026, is essential for effective knowledge transfer and mentoring, allowing the new leader to become fully acclimated with our operations and strategic goals. The current director will be available for consulting if needed after FY26.

The \$10,000 increase will cover the costs associated with this transition period, including additional salary expenses for the dual leadership roles and the training and onboarding of the new RHSO Director. This investment will not only safeguard the continuity of our programs but also strengthen our organizational stability. The cost associated with this transition will be shared across all member communities.

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 town 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 Housing 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 Housing Trust funds support housing activities for the Housing 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 submissions 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 Sudbury leasing for compliance with the marketing plan, review compliance with the 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 Sudbury units.
- Inventory Management: Maintain housing inventory and provide estimates for 2025 Subsidized Housing Inventory (SHI) projections.
- 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 Housing Trust. The Housing Trust activities are listed below, though this application does NOT request funding for them:

Housing Trust Housing Activities (not funded by CPA)

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

- Housing Trust
- 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 and assists the Planning and Community Development Department in allowing the Housing Production Plan to be carried out in a consistent and thoughtful manner.

The proposal meets the following category specific criteria for eligibility:

- Contributes to the goal of 10% affordability;
- Conforms to the Town's Housing Production Plan;
- Promotes a socioeconomic environment that encourages a diversity of income;
- Provides housing that is harmonious in design and scale with the surrounding community;
- Intermingles affordable and market rate housing at levels that exceed state requirements for percentage of affordable units;
- Ensures long-term affordability;
- Promotes use of existing buildings or construction on previously-developed or Town-owned sites;
- Converts market rate to affordable units;
- Gives priority to local residents, Town employees, and participants in the Sudbury METCO program.

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:
 - Inability to maintain compliance with the affordable housing regulatory agreements and requirements.
 - Leaving a department (Planning and Community Development) with a sizable workload to staff who are unqualified to assist and manage such matters.

This proposal demonstrates the project can be implemented 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 is 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.