



Regional Housing Services Office

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

141 Keyes Road
Concord MA 01742
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April 20, 2015

To: Steven Ledoux, Richard Reed, John Petrin, Chris Whelan, Carl Valente, Maureen Valente, Donna VanderClock, Roland Bartl, Nancy Tavernier, Kristen Guichard, Jessica Porter, Jim Doherty, Marcia Rasmussen, Lara Kritzer, Maryann McCall-Taylor, Aaron Henry, Jody Kablack, Jim Kupfer, Noreen Stockman

CC: Dan Gaulin, Lara Plaskon

From: Elizabeth Rust

RE: Regional Housing Services Office – FY2015 Q3 Status Report

This is the status report for activity from 1/1/2015 through 3/31/15 (FY15 Q3) for Regional Housing Services Office, an inter-municipal collaboration between Acton, Bedford, Burlington, Concord, Lexington, Sudbury and Weston. Please let me know if you have any comments or questions.

Overall Program:

The fourth year of the RHO is approaching completion, and the overall program is proceeding as planned.

The preparations for FY16 are well underway. A draft budget was created in February and reviewed with each member Town in March. Appropriations are in process as Town Meeting schedules proceed.

The draft FY16 IMA amendment was distributed in February and final documents will be prepared for May, with Selectmen approval and signature planned in June.

Regional Activities:

The RHSO Advisory Committee met in February and amongst other items, discussed the RHSO website, the homeowner training (scheduled for May 20), the idea of an RHSO Roundtable for Boards and Committees of the RHSO member communities (planned for June 18), and performing outreach to housing providers of group homes (letters to be mailed in April). The RHSO Advisory Committee posts its meetings and minutes as it is subject to the Open Meeting Law.

The website - RHSOHousing.org – plans to launch on May 8. The starting content has mostly been developed and sent to the developers. The website contains a public portion with information for current residents about information and services available and prospective residents about affordable housing opportunities. We are very excited about this initiative and know it will upgrade the RHSO services.

The RHSO presented at a Massachusetts American Planning Association conference on Inclusionary Zoning on March 18 which was well attended, and spoke about the importance of monitoring in preserving units.



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Monitoring:

The monitoring program is the core of the program activities with almost 5,000 units of affordable housing across the communities.

Ownership Units: For the ownership units, the annual review is performed through a review of the registry of deed for any recorded activity and receiving a self-certification from each owner. Certifications for LIP units are submitted annually to DHCD.

This year a 94% response rate was again achieved through three mailings (10/7, 11/28, 1/12). Reviews of the registry of deeds were performed for each ownership unit to obtain updates on financing information with very few issues to report. The

ownership certification letters for Burlington will follow a slightly different process which is in discussion now.

Rental Projects: Monitoring the Local Initiative Program (LIP) rental units is a RHSO priority. There are 16 LIP rental projects with 784 LIP units in the RHSO service area. For these units, the Towns have the responsibility to certify compliance to DHCD annually, as required in the Regulatory Agreements.

The RHSO monitoring review includes ensuring that the rents are calculated in accordance with the Regulatory Agreement, that the tenants are recertified using source documents, and that the units are maintained in accordance with all applicable standards. This is accomplished through rent and file reviews and site visits, with a final Monitoring Report available to the Project Sponsor, approved by the Municipality and submitted to DHCD.

4/20/2015	2015 Self-Declaration				2014 Self-Declaration
	Sent	Rec'd	Open	% rec'd	% rec'd
Acton	49	46	3	94%	91%
Bedford	49	44	5	90%	91%
Concord	65	61	4	94%	97%
Lexington	14	14	0	100%	100%
Sudbury	32	32	0	100%	100%
Weston	27	24	3	89%	88%
<i>total</i>	236	221	15	94%	94%

	Town	Development Name	SHI units	Subsidy Program	Last Monitoring	2015 Monitoring Status
1	Acton	214 Central St (AHA)	01	LIP 40B	May 2013	Priority 1: In process, by June
2	Acton	Somerset Hills (AHA)	2	LIP-LAU	May 2013	Priority 1: In process, by June
3	Acton	Lalli Terrace (AHA)	1	LIP 40B	New project	Priority 3: Awaiting RA
4	Acton	Inn at Robbins Brook	3	LIP-LAU	New project	Priority 1: In process
5	Bedford	Village at Concord Road	12	LIP 40B	September 2014	Priority 2: Complete by September
6	Bedford	Patriot Place	10	LIP 40B	September 2014	Priority 2: Complete by September
7	Bedford	Village at Taylor Pond	200	LIP-LAU	September 2014	Priority 2: Complete by September
8	Burlington	Arborpoint	34	LIP-LAU	New project	Priority 1: In process, by June
9	Concord	Concord Mews	350	LIP 40B	New project	Priority 1: Awaiting contract
10	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	2012	Priority 1: In process, by June
11	Concord	Warner Woods	0	MH NEF	June 2014	Priority 2: Complete by September
12	Lexington	Avalon at Lexington Hills	97	LIP 40B	July 2014	Priority 1: Complete by June
13	Lexington	Avalon Lexington	56	Local	July 2014	Priority 1: Complete by June
14	Lexington	LexHAB Scattered Sites	9	LIP-LAU	July 2014	Priority 1: Complete by June
15	Sudbury	Willis Lake (SHA)	1	LIP-LAU	New project	Priority 2: Complete by September
16	Weston	Church, Jones, Pine Street	4	LIP LAU	July 2014	Priority 2: Complete by September
			784			



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SHI Administration

Managing the SHI inventory is an important part of the services provided. A total of 190 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO, with 14 this fiscal year. There is pipeline in each community, and units will be added when available, with 23 expected in Q4 between Bedford, Burlington, Concord, Lexington and Sudbury.

SHI	FY11	FY12	FY13	FY14	SHI 1/1/15				FY15 Updates	
	# Units	# Units	# Units	# Units	#Housing Units	#SHI Units	% Subsidized	+/- 10%	# Units	Details
Acton		516	552	549	8,475	552	6.51%	-296	2	-2 AHA, +3 PO Crossing, 2 Quail Ridge.
Bedford	860	887	903	902	5,322	902	16.95%	370		[Q4: 2 Crossing]
Burlington				993	9,627	1002	10.41%	39	9	9 Seven Springs. [Q4: 6 Kimball Woods]
Concord	701	719	707	710	6,852	710	10.36%	25		[Q4: 8 Brookside Sq]
Lexington	1320	1330	1334	1334	11,946	1329	11.17%	134	-5	-5 DDS, [Q4: 4 Fairview]
Sudbury	281	351	343	353	5,921	354	5.98%	-238	1	+1 Pratts Mill. [Q4: 3 Maynard Rd]
Weston	137	141	142	142	3,952	149	3.59%	-246	7	7 Warren Ave
total	3299	3944	3981	4983	52,095	4998	9.59%	-212	14	

Town-Specific Monitoring

Other monitoring efforts include assisting residents with refinancing as well as updating the database with new projects, new owners, new financing and any other general updates. The RHSO activity for refinancing includes assisting the owners with the process and then to prepare approval documents on behalf for Town signature, as appropriate.

In Acton, continued monitoring review of Robbins Inn by working with the owner, DHCD and the Town, assisted with two financing requests, and completed the Annual Compliance Report for the Franklin Place MassHousing project.

In Bedford, continued to work with Taylor Pond on changes to their application, approved 2015 rents for Patriot Place.

In Burlington, for Grandview Commons completed a detailed analysis of all project materials with multiple review meetings resulting in two final monitoring reports, and added 9 units to the SHI from Arborpoint ownership project.

In Concord, continued to pursue Concord Mews monitoring arrangements, worked with Warner Woods on refunding \$2255 to one tenant in a specialized situation, recommended approval for the 2015 rents at the Mews, and completed the Annual Compliance Report for the Elm Court MassHousing project.



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In Lexington, completed the annual process to maintain the SHI units for Katahdin Woods, met with LexHAB to discuss the Town role in LexHAB units started review of the Muzzey units, recommended approval for the 2015 rents at Avalon.

In Sudbury, completed the Annual Compliance Report for the Snowberry Lane, Village at Old County Road and Landham Crossing MassHousing projects.

In Weston, continued to work with residents of Dickson Meadows on the annual recertification process and recommended process changes, added 7 units to the SHI for Warren Ave.

HOME Support:

The activities in the HOME support category include attending quarterly meetings, assisting communities to commit and expend their available Program funds, as well as completing their administrative requirements. The RHSO has assisted the member communities commit \$512,000 since FY13, with another \$268,000 planned by July. In this reporting period:

- Bedford – Completed the Annual Action Plan and the Regional Analysis of Impediments data gathering outline, started discussion and analysis on establishing a Tenant Based Rental Assistance (TBRA) program, and continued to support the Bedford Housing Authority complete rehabilitation work for 20 Railroad Avenue as needed (80% complete with \$20k left to spend).
- Concord – Completed the Regional Analysis of Impediments data gathering outline, supported the renovation project of CHA units on Thoreau Street through the bidding process (\$16k spent of \$115k), started work on the commitment process for the Peter Bulkeley expansion units (due by July) and invoiced the admin funds for the RHSO membership fee.
- Lexington – Completed the Annual Action Plan and the Regional Analysis of Impediments data gathering outline, started discussion and analysis on establishing a Tenant Based Rental Assistance (TBRA) program and amended the Funding Agreement for the Lexington Housing Authority Mass Ave project adding \$22k of FY15 funds to the project. The project construction is almost complete and 50% of the total project cost (\$199k) has been requisitioned.
- Sudbury – Completed the Annual Action Plan and the Regional Analysis of Impediments data gathering outline, and prepared summary information on Sudbury's HOME Program.



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 activities were performed in this reporting period:

- Acton – Completed the photo inventory of all the affordable housing units.
- Bedford – Attended periodic Bedford Housing Partnership and Bedford Housing Trust meetings, assisted the Bedford Housing Partnership in feasibility of establishing buy-down and TBRA programs, continued to assist in preparing documents for the Coast Guard project, assisted Patriot Place with requirements in filling a vacancy.
- Burlington - provided draft application materials for the potential resale at Winnview Heights.



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- Concord – Prepared parameters and eligibility guidelines for purchasers of moderate income units for the Planning Board, and wrote a Local Preference justification for Brookside Square.
- Lexington – Completed discussions with Avalon to reduce the Section 8 payment standard from 110% to 100% for Lexington Housing Authority issued vouchers (~\$6k per year returned to the program), met with the Lexington Housing Authority and LexHAB as part of the monthly meeting agendas.
- Sudbury – Attended meetings of the Sudbury Housing Trust and prepared corresponding agenda packages and reports including trustee recommendation, prepared feasibility analyses for the Trust and the Housing Authority on a potential purchase, participated on the Maynard Road project by completing the MassHousing Final Approval package containing numerous documents, revised the Small Grants application for the 2015 eligibility updates, assisted the Housing Trust with lottery and resale services by submitting: proposal for a project in Concord, contract for Battle Road Farm, the Local Action Unit application for projects in Concord and Framingham, completing marketing packages for Framingham and supporting open application periods in Holliston and Concord, and administering the lottery in Needham.
- Weston – No local support activities performed in the reporting period..

Q3 Hours Recap:

The RHSO is currently fully staffed. As the year approaches completion we are starting to consider how the hours will end up. While we aim to deliver exactly as we budgeted, this is not always possible. The overall budget is built on estimates of work for the year, and the actual projects and effort varies somewhat.

At this point in the year, while the projection of how many remaining hours for each community is only an estimate, we are able to make some early forecast. As the year has progressed, we have obtained approvals for additional hours from Sudbury, Weston and Burlington and those are included in the planning.

At this juncture, it seems possible that the towns of Acton, Concord and Bedford will have unused hours, which will be applied to FY16 membership for a total of 100 hours. The other communities are projected to be at budget.

We will work towards all communities tracking to budget by the end of the year and will review in detail for the remainder of the year.

	YTD Actual (3/31)	YTD Budget	YTD Difference
Acton	251	278	(27)
Bedford	281	300	(19)
Burlington	144	127	17
Concord	270	319	(49)
Lexington	298	300	(2)
Sudbury	459	450	9
Weston	131	124	7
	1,834	1,897	(63)