



## Regional Housing Services Office

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

141 Keyes Road  
Concord MA 01742  
(978) 287-1090

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April 26, 2016

To: Steven Ledoux, Richard Reed, John Petrin, Chris Whelan, Carl Valente, Melissa Murphy-Rodrigues, Donna VanderClock, Roland Bartl, Nancy Tavernier, Kristen Guichard, Michael Rosen, Jim Doherty, Marcia Rasmussen, Lara Kritzer, Aaron Henry, Carol Kowalski, Jody Kablack, Noreen Stockman

CC: Dan Gaulin, Lara Plaskon

From: Elizabeth Rust

RE: Regional Housing Services Office – FY2016 Q3 Status Report

This is the status report for activity from 1/1/2016 through 3/31/16 (FY16 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:**

We have completed the third quarter of FY16 and the year is nearing to a close. A FY17 budget has been finalized and will be presented to the Town Managers/Administrators at their annual update meeting on May 17 along with the annual IMA amendment. In June, presentations will be made to each member's Selectmen for signature.

The RHSO continues to advocate for the benefits of proactive monitoring at industry conferences. We presented at the winter meeting of the Board of Assessors (Affordable Housing Valuation), and moderated a panel at a recent Mass Housing Partnership CPA conference.

We assist others interested in establishing similar regional housing collaborations in Massachusetts including the Central Massachusetts Regional Planning Commission (based in Worcester) and the Devens Enterprise Commission (serving Devens, Ayer and Shirley). They each have funding and are starting their own efforts. There are 17 municipalities actively participating in three RHSO groups currently.

### **Regional Activities:**

The website - [RHSOHousing.org](http://RHSOHousing.org) – is fully launched, with Phase 2 completely launched this quarter. It has sections for housing inventories for each community, property specific information, services for current residents including Town Specific offerings and housing opportunities for prospective residents, and a members-only section for unit level information, delivery of regulatory information, and reporting. There have been 1789 web sessions over this last quarter, a 40% increase over last quarter, 63% of them from new visitors, which is consistent with last quarter. We regularly update the site with new properties, new owners (8 this quarter), resident services and other information as requested.



The RHSO is in the planning stages of two training sessions – annual Post-purchase Homeowner training, and a Fair Housing session – both planned for June.



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## SHI Administration

Managing the SHI inventory is an important part of the services provided. A total of 295 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO, with 99 added in this fiscal year and 3 in this reporting period (3 Acton in Quail Ridge, Acton

	SHI FY16				FY16 SHI Pipeline				SHI change since RHSO	NON-SHI Restricted Units	Total # Restricted Units
	#Housing Units	#SHI Units	% Subsidized	+/- 10%	TOTAL FY16 plan	# Units Added	Planned	Details			
Acton	8,475	554	6.54%	-294	10	4	6	3 Quail, 7 Meadows	38	1	555
Bedford	5,322	974	18.30%	442	72	72		2 Crossing, 70 VA	114	6	980
Burlington	9,627	1011	10.50%	48	9	9		6 Kimball Woods, 3 Holly Glen	18	46	1057
Concord	6,852	718	10.48%	33	5		5	4 Peter B. 1 Ingham/Millstone	17	19	737
Lexington	11,946	1339	11.21%	144	10	10		4 Fairview, 4 Greeley, 2 MassAv	19	80	1419
Sudbury	5,921	358	6.05%	-234	4	4		3 Maynard Rd, 1 HP	77	0	358
Weston	3,952	149	3.77%	-246	2		2	2 Vires St	12	2	151
<b>total</b>	<b>52,095</b>	<b>5103</b>	<b>9.80%</b>	<b>-107</b>	<b>112</b>	<b>99</b>	<b>13</b>		<b>295</b>	<b>154</b>	<b>5257</b>

Meadows).

The SHI percentage is calculated as the number of qualifying affordable housing units as the numerator and the total number of housing units as the denominator. The numerator is adjusted as units are created, and the denominator is updated with each decennial census. The RHSO has created a model to project SHI percentages in 2020 when the new Census is published and the denominator changes, and is completing it for RHSO communities. The model uses information provided by the UMass Donahue Institute, the liaison to the Population Division of the U.S. Census Bureau for Massachusetts, from data provided to the Census from each community's building department.

## Monitoring:

The monitoring program is the core of the program activities with over 5,100 units of restricted housing across the communities. The table shows the 03/31/2016 summary of the unit breakdown for each community.

AS OF 12/31	SHI Units	Rental							Ownership			
		Total SHI rental	%affordable	Total affordable rental	PHA	DDS, DMR	Private		Other Town	Total	SHI	Other Local or Moderate
							Affordable	Market				
Acton	554	497	53%	261	157	26	78	236		58	57	1
Bedford	974	928	49%	457	100	59	298	471		52	46	6
Burlington	1011	995	39%	391	107	83	201	604		62	16	46
Concord	718	668	47%	311	134	34	143	357		69	50	19
Lexington	1339	1,320	49%	654	274	88	251	672	41	73	13	60
Sudbury	358	321	89%	286	92	0	194	35		37	37	0
Weston	149	124	100%	124	0	0	62	0	62	27	25	2
<b>total</b>	<b>5,103</b>	<b>4,859</b>	<b>51%</b>	<b>2,484</b>	<b>864</b>	<b>290</b>	<b>1,227</b>	<b>2,375</b>	<b>103</b>	<b>378</b>	<b>244</b>	<b>134</b>

**Ownership Units:** For the deed restricted ownership units, the annual monitoring review is performed by:

- Reviewing the registry of deeds for any recorded activity
- Reviewing the owner mailing addresses from the town records
- Receiving a self-certification from each owner.

Annually, annual certifications for the LIP units are submitted to DHCD if required.



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The ownership monitoring process establishes clear communication with the owners documenting their obligations, as well as provides a contact for on-going questions. It has been proven to be very helpful.

The FY16 certification process started in October with a self-certification mailing to all deed restricted owners (except in Burlington) – the third (and last) notice was mailed 1/13/16. This year we attained a 94% response rate, with 15 open responses – the same response rate as the last two years.

3/18/2016	2016 Self-Declaration				2015	2014
	Sent	Rec'd	Open	% rec'd	% rec'd	% rec'd
Acton	49	46	3	94%	94%	91%
Bedford	49	45	4	92%	90%	91%
Concord	68	64	4	94%	95%	97%
Lexington	14	14	0	100%	100%	100%
Sudbury	33	32	1	97%	100%	100%
Weston	27	24	3	89%	89%	88%
<b>total</b>	<b>240</b>	<b>225</b>	<b>15</b>	<b>94%</b>	<b>94%</b>	<b>94%</b>

*Rental Projects:* Monitoring the Local Initiative Program (LIP) rental units also is a RHSO priority. There are 17 LIP rental projects with 792 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 continues to advance. The basic 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. Advancements are being made in verifying the Property Managers are selecting residents through an approved Affirmative Fair Housing Marketing Plans (AFHMP) including advertising requirements.

	Town	Development Name	SHI units	Subsidy Program	2016 Monitoring
1	Acton	214 Central St (AHA)	1	LIP 40B	Spring
2	Acton	Somerset Hills (AHA)	2	LIP-LAU	Spring
3	Acton	Lalli Terrace (AHA)	1	LIP 40B	Spring
4	Acton	Inn at Robbins Brook	3	LIP-LAU	Complete
5	Bedford	Village at Concord Road	12	LIP 40B	Fall
6	Bedford	Patriot Place	10	LIP 40B	Fall
7	Bedford	Village at Taylor Pond	200	LIP-LAU	Fall
8	Burlington	Arborpoint	34	LIP-LAU	
9	Concord	Concord Mews	350	LIP 40B	Complete
10	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	Started
11	Concord	Brookside Square	8	LIP-LAU	Next Year
12	Concord	Warner Woods	0	MH NEF	Summer
13	Lexington	Avalon at Lexington Hills	97	LIP 40B	Spring
14	Lexington	Avalon Lexington	56	Local	Spring
15	Lexington	LexHAB Scattered Sites	9	LIP-LAU	Summer
16	Sudbury	Willis Lake (SHA)	1	LIP-LAU	Summer
17	Weston	Church, Jones, Pine Street	4	LIP LAU	Spring

### 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.



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In Acton: Completed site visit and distributed a draft monitoring report for Inn at Robbins Brook; completed Town consent for a refinance, worked with a recent owner on deed transfer (with issues), completed MassHousing annual compliance report for Franklin Place.

In Bedford: Assisted in obtaining the lease rent at 447 Concord Road, started discussions with owner on Bedford Village expiring use.

In Burlington: Provided recommendation for changes to rent calculations for Kimball Towers.

In Concord: reviewed Concord Mews monitoring activities as a result of the DHCD Monitoring Report; completed MassHousing annual compliance report for Elm Court.

In Lexington, contacted owners at Muzzey for primary residence verification and continued analysis of resale prices; with Avalon completed final documents on local Regulatory Agreement for Avalon Lexington as the MassHousing RA has expired; met with LexHAB for monitoring follow-up review, prepared initial monitoring review of affordable units at the Youville property.

In Sudbury, provided comments on Landham Crossing Cost Certification reports; completed MassHousing annual compliance reports for Village at Old County Road, Landham Crossing and Sudbury Meadows.

In Weston, no specific monitoring activities performed this quarter.

### **HOME Support:**

The activities in the HOME support category assist communities 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 \$903,000 since FY13, and is working towards committing an additional \$84,000 in the next quarter.

In this reporting period the RHSO attended the quarterly meeting, and:

- Bedford – Completed the FY17 Annual Action Plan, processed requisition for admin funds, and awaited response on the Bedford Initial Rental Assistance Program.
- Concord – Received an RFP award for the Peter Bulkeley expansion units, processed requisitions for admin funds.
- Lexington – Completed the FY17 Annual Action Plan, processed requisition for admin funds, started a new HOME project to assist in the acquisition of a unit of affordable housing at Keeler Farm.
- Sudbury – Completed the FY17 Annual Action Plan, processed requisition for admin 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 – Supported the Town on 6 pending 40B developments.
- Bedford – Completed 2020 SHI projections; attended periodic Bedford Housing Partnership and Bedford Housing Trust meetings; assisted with the Coast Guard land project including site visit and construction estimate assistance.



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- Burlington – Completed 2020 SHI projections; prepared Local Preference justification for the Corporate Drive/Tremont project.
- Concord – Continued working with CHAPA to schedule a housing tour in Concord for the CHAPA Housing Committee; continued working with CHDC on Junction Village funding, potential new projects and administering the Small Grant Program including drafting monitoring letters; received DHCD approval for the Concord 2015 Housing Production Plan.
- Lexington – Completed 2020 SHI projections, attended the Lexington Housing Partnership meeting.
- Sudbury – Completed 2020 SHI projections; completed the 2016 Housing Production Plan including drafting needs assessment with one-page Housing Profile, held a community workshop for public input, drafted the Goals and Strategies, presented to the Planning Board and Board of Selectmen for adoption, and submitted final adopted plan to DHCD; supported the Sudbury Housing Trust by: preparing agendas and attending monthly meetings, contracting with an entity for translation services, supporting the 8<sup>th</sup> Home Preservation unit repair process; supporting the Small Grant Program by sending grant awards and drafting monitoring letters and performed lottery and resale services by contracting with Holliston and Plainville, drafting marketing plans for Holliston, finalizing marketing plans for Black Birch in Concord and Messenger Woods in Plainville, opening the marketing period/placing ads for Plainville, qualifying finalist applicants and administering a lottery in Concord, and supporting closings in Framingham.
- Weston – Provided a memo and information to the Town and MassHousing on condo fee methodologies (sales price method versus square footage method) for affordable housing developments.

### Q3 Hours Recap:

The table below shows the Q3 hours by community – actuals and budget, with difference for both YTD and annualized amount, as well as the FY17 proposal.

Any unused hours (represented by negative numbers) will be applied as refunds to FY17 as the community has already paid for them. Overages will be reviewed with each community for the appropriate course of action. Options include purchasing additional hours or reducing work for the remainder of the year.

Thru 3/31	YTD			Annual projections			FY17 Proposal
	Actual	Budget	Difference	Actual	Budget	Difference	
Acton	257	278	-20	343	370	-27	320
Bedford	324	315	9	432	420	12	410
Burlington	128	177	-49	170	236	-66	210
Concord	419	383	36	558	510	48	440
Lexington	326	308	19	435	410	25	410
Sudbury	479	450	29	639	600	39	600
Weston	106	124	-18	141	165	-24	155
	2038	2033	5	2718	2711	7	2545

