



Regional Housing Services Office

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

141 Keyes Road
Concord MA 01742
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July 30, 2015

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

CC: Dan Gaulin, Lara Plaskon

From: Elizabeth Rust

RE: Regional Housing Services Office – FY2015 Q4 Status Report

This is the status report for activity from 4/1/2015 through 6/30/15 (FY15 Q4) 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 fourth year of the RHSO.

The year completed close to budget. Two communities purchased more hours during the year for regular program services (first time this has happened), and three communities are due refund adjustments in FY16 for unused hours. As agreed, variances plus/minus 5 hours are absorbed. The RHSO tries hard to estimate precisely what is needed for each community – it is both art and science!

The plans for FY16 are set: The IMA Amendment was reviewed and signed by each Town Selectmen/Select Board, the budget is approved, the hours staffed, the invoices distributed, and some have already been paid.

FY15	Budget (with additions)			Actual		Difference	
	Amount	FY14 Refund	Funded Hours	Amount	Hours	Amount	Hours
Starting Balance	\$19,000			\$19,000		\$0	
Income							
Acton	\$25,090	\$8,032	370	\$17,078	319	\$0	(51)
Bedford	\$27,124	\$8,234	400	\$18,890	384	\$0	(16)
Burlington	\$11,890	\$0	175	\$11,890	175	\$0	0
Concord	\$28,820	(\$1,312)	425	\$30,132	410	\$0	(15)
Lexington	\$27,124	\$5,860	400	\$21,264	405	\$0	5
Sudbury	\$39,478	(\$2,301)	600	\$41,839	598	\$0	(2)
Weston	\$11,023	\$567	165	\$10,456	169	\$0	4
Adjustments	(\$19,000)	\$0		\$0			
Total	\$151,549	\$19,000	2,535	\$151,549	2,460	\$0	(75)
Expenses							
Staffing	\$152,825		560.29	\$148,224	560.25	(\$4,601)	
Program expenses	\$4,753			\$4,799		\$46	
Administrative Cost	\$15,000			\$15,030		\$30	
Total Expenses	\$172,578			\$168,053		(\$4,525)	
Ending Balance	(\$2,029)			\$2,496		\$4,525	
Billing Rate	\$68.08			\$68.11			

Regional Activities:



The website - RHSOHousing.org – launched on May 8. The website contains sections for housing inventories for each community, property specific information, services for current residents including Town Specific offerings and housing opportunities for prospective residents.

We are very excited about this initiative and know it will upgrade the RHSO services. There have been 300 unique visitors to the site since launch.

The Advisory Committee has approved the Phase 2 of the website, which would provide a ‘members only’ portal, unit level information, delivery of regulatory information and reporting. The cost will be spread over two years, and each community will pay equally (\$357 each for year 1). This will be a focus of this coming year.



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On the Program side, the RHSO sponsored the annual homeowner post-purchase training session in Concord on May 20, with Massachusetts Affordable Housing Alliance, with a focus on condominium ownership and estate planning. All owners of restricted properties were invited, and 31 attended.

Monitoring:

The monitoring program is the core of the program activities with over 5,000 units of restricted housing across the communities. Below is the summary of the unit breakdown for each community.

AS OF 7/30	SHI				Rental								Ownership				
	Total Units	#SHI Units	% Subsidized	+/- 10%	Total rental	%affordable	Total affordable rental	PHA	DDS, DMR	Private		Town Sponsored	SHI Pipeline	Total	SHI	SHI Pipeline	Other Local or Moderate
										Affordable	Market						
Acton	8,475	552	6.51%	-296	498	53%	262	157	27	78	236			64	54	9	1
Bedford	5,322	902	16.95%	370	858	45%	387	100	59	228	471		70	52	44	2	6
Burlington	9,627	1002	10.41%	39	989	36%	356	107	83	166	633		6	62	13	3	46
Concord	6,852	718	10.48%	33	668	47%	311	134	34	143	357		4	70	50	1	39
Lexington	11,946	1333	11.16%	138	1,320	49%	648	268	88	251	672	41	6	73	13		60
Sudbury	5,921	357	6.03%	-235	321	89%	286	92	0	194	35			37	36	1	0
Weston	3,952	149	3.77%	-246	124	100%	124	0	0	62	0	62	2	27	25		2
total	52,095	5,013	9.62%	-197	4,778	50%	2,374	858	291	1,122	2,404	103	88	385	235	16	134

Ownership Units: For the ownership units, the annual review is performed through a review of the registry of deeds for any recorded activity and receiving a self-certification from each owner. Certifications for LIP units are submitted annually to DHCD. The FY16 process is planned to start in September.

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 first to the Project Sponsor, then approved by the Municipality and submitted to DHCD.

The RHSO reminded the LIP Property Managers (through a mailing in June) about the DHCD requirements to list all affordable rental units on the MassAccess Housing Registry, to update their Affirmative Fair Housing Marketing Plan at least every five years, and to annually propose schedules of annual rents and utility allowances for the Town and DHCD to review and approve. There has been much activity around Fair Housing at the federal and state level, and the RHSO will host a conference for the property owners and managers again, with a focus this year on Fair Housing rental practices.



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	Town	Development Name	SHI units	Subsidy Program	Last Monitoring	2015 Monitoring Status
1	Acton	214 Central St (AHA)	01	LIP 40B	May 2013	Complete- to DHCD June 2015
2	Acton	Somerset Hills (AHA)	2	LIP-LAU	May 2013	Complete- to DHCD June 2015
3	Acton	Lalli Terrace (AHA)	1	LIP 40B	New project	Complete- to DHCD June 2015
4	Acton	Inn at Robbins Brook	3	LIP-LAU	New project	In process - by Owner
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	In process – Visit complete
8	Burlington	Arborpoint	34	LIP-LAU	New project	Complete- to Town June 2015
9	Concord	Concord Mews	350	LIP 40B	New project	Priority 1: Awaiting contract
10	Concord	405 Old Bedford Road (CHA)	4	LIP LAU	2012	Complete- to DHCD June 2015
11	Concord	Warner Woods	0	MH NEF	June 2014	Complete June 2015
12	Lexington	Avalon at Lexington Hills	97	LIP 40B	July 2014	In process – Report drafted
13	Lexington	Avalon Lexington	56	Local	July 2014	In process – Report drafted
14	Lexington	LexHAB Scattered Sites	9	LIP-LAU	July 2014	In process – Report drafted
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	Complete June 2015
			784			

SHI Administration

Managing the SHI inventory is an important part of the services provided. A total of 202 units have been added to the Subsidized Housing Inventory for the member communities since they joined the RHSO, with 27 this fiscal year. There is FY16 pipeline in each community, and units will be added when available, with 104 units expected this year.

	FY11	FY12	FY13	FY14	SHI 6/30/15				FY15 Updates		SHI change since RHSO
	# Units	# Units	# Units	# Units	#Housing Units	#SHI Units	% Subsidized	+/- 10%	# Units	Details	
Acton		516	552	549	8,475	552	6.51%	-296	3	-2 AHA, 3 PO Crossing, 2 Quail Ridge	36
Bedford	860	887	903	902	5,322	902	16.95%	370			42
Burlington				993	9,627	1002	10.41%	39	9	9 Seven Springs	9
Concord	701	719	707	710	6,852	718	10.48%	33	8	8 Brookside Sq	17
Lexington	1320	1330	1334	1334	11,946	1333	11.16%	138	-1	-5 DDS, 4 Fairview	13
Sudbury	281	351	343	353	5,921	354	5.98%	-238	1	1 Home Preservation	73
Weston	137	141	142	142	3,952	149	3.77%	-246	7	7 Warren Ave	12
total	3299	3944	3981	4983	52,095	5010	9.62%	-200	27		202

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



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includes assisting the owners with the process and then to prepare approval documents on behalf for Town signature, as appropriate.

In Acton, continued working with the owner of Robbins Inn on annual certification, completed the monitoring for the AHA LIP units.

In Bedford, worked with Taylor Pond on rent approvals, application updates, site visits, and eligibility review, worked with owner on refinancing (approval after the fact).

In Burlington, completed Arborpoint monitoring report for the Town, recommended approval of the Kimball Towers rents, drafted a modified process and letter for ownership monitoring for Burlington.

In Concord, supported the monitoring contacting efforts of the Town for Concord Mews, assisted in the resale of Riverwalk moderate income unit.

In Lexington, completed monitoring field work for LexHAB and Avalon, and drafted reports (in review by owner), prepared a draft local Regulatory Agreement for Avalon at Lexington as the MassHousing agreement was discharged, supported Town in reviewing foreclosure settlement agreement.

In Sudbury, no monitoring activities performed in the reporting period.

In Weston, proposed process changes for the Dickson Meadows annual recertification process to the Condo Association and completed the completed the monitoring for the WAHFI LIP units.

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. This period also included iterative reviews of the WestMetro HOME Consortium Regional Fair Housing Plan. The RHSO has assisted the member communities commit \$512,000 since FY13, with another \$355,000 planned in August. In this reporting period:

- Bedford – Prepared materials and obtained support from the Bedford Housing Partnership and the Board of Selectmen for establishing a Tenant Based Rental Assistance (TBRA) program for security deposit and first month rent, and supported the renovation project of the Bedford Housing Authority units on Railroad Avenue project as needed (80% complete with \$20k still left to spend to replace the emergency exit, bathroom vanity, kitchen cabinets and other carpentry work).
- Concord – Completed the commitment process for the Peter Bulkeley expansion units, including the underwriting review, the environmental review and preparation of the closing documents, and supported the renovation project of the Concord Housing Authority units on Thoreau Street as needed (\$16k spent of \$115k).
- Lexington – Prepared materials and obtained support from the Lexington Housing Partnership for establishing a Tenant Based Rental Assistance (TBRA) program for security deposit and first month rent and finalized the Lexington HOME TBRA Payment Standard (designed to increase available units), and supported the renovation project of the Lexington Housing Authority unit on Mass Ave as needed including having the Affordable Housing Restriction recorded (\$158k spent of \$199k).
- Sudbury – Coordinated with DHCD monitoring agents for the first annual monitoring of the Coolidge project.



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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.

This quarter the RHSO (on behalf of the member communities) sent a letter to 33 housing providers of homes licensed or regulated through DDS and DMH to reach out and show the towns' support for those services. No direct response was expected or received.

The following local support activities were performed for each community in this reporting period:

- Acton – No local support activities performed in the reporting period.
- Bedford – Attended periodic Bedford Housing Partnership and Bedford Housing Trust meetings, and assisted the Bedford Housing Partnership in feasibility of establishing a buy-down program.
- Burlington - No local support activities performed in the reporting period.
- Concord – Drafted parameters and eligibility guidelines for purchasers of moderate income units and reviewed with Planning Board, was interviewed by Concord Journal, obtained quotes and made a recommendation for a Housing Production Plan consultant, worked with and prepared a presentation for the CHDC on Junction Village for the Select Board.
- Lexington – Presented at a community meeting at the request of the Lexington Housing Partnership, responded to LexHAB request on Town role in compliance issues for LexHAB units.
- Sudbury – Completed the annual eligibility package for Frost Farm, drafted SHI projections through 2020, assisted Mass Housing Partnership with their upcoming guidebook on Municipal Housing Trusts and attended a meeting regarding potential legislation changes for Trusts, presented at a Community Preservation Committee meeting, attended meetings of the Sudbury Housing Trust and prepared corresponding agenda packages and reports including the Town Meeting presentation, participated on the Maynard Road project by completing the MassHousing Final Approval application, obtaining the approval, drafting a neighbor letter, supporting the closing and groundbreaking, assisted the Housing Trust with lottery and resale services by having contracts signed for two projects in Concord, completing the marketing materials for Montage, Maynard Road and Black Birch, supporting the lotteries in Concord and Holliston, and reviewing applicant eligibility.
- Weston – No local support activities performed in the reporting period.