



TOWN OF CONCORD COMMUNITY PRESERVATION COMMITTEE

141 KEYES ROAD, CONCORD, MA 01742
TEL. (978) 318-3290 FAX (978) 318-3291

Application for CPC Funding

Due no later than 12:00 noon on Friday, September 8, 2023

Applicant*: Town of Concord

Federal Tax Id. No.*: 046-001-121

Co-Applicant (if applicable): _____

Project Name*: Regional Housing Services Office

Project Location/Address (if applicable): 141-Keyes Road Concord

Purpose*: (Select all that apply)

Open Space Community Housing Historic Preservation Recreation

Project Budget*:

Amount of CPC Funds Requested: \$ 33,500

Amount from Other Funding Sources: \$ 33,500

Total Project Budget: \$ 67,000

(If multi-year project, note current phase only)

Please check which of the following is included with this Application:

- | | |
|---|---|
| <input checked="" type="checkbox"/> One Paragraph Project Summary * | _____ Architectural plans, site plans, photographs (if appropriate) |
| _____ Map (if applicable) | _____ Copy of IRS determination letter (Non-profit Organizations only)* |
| <input checked="" type="checkbox"/> Narrative * | _____ Copy of Audit or most recent Financial Information (<u>Non-profit Organizations</u> only)* |
| _____ Selection Criteria and Needs Assessment | _____ Letters of Support (if any) |
| <input checked="" type="checkbox"/> Detailed Project Budget * | |
| _____ Feasibility Assessment | |
| _____ Statement of Sustainability (if applicable) | |
| <input checked="" type="checkbox"/> Timeline * | |

Project Contact Person*: Megan J. Zammuto

Project Contact Address*: 22 Monument Sq. Concord, MA

Project Contact Phone*: 978-318-3006 Email*: mzammuto@concordma.gov

Authorized Signature of Applicant*: Megan J. Zammuto

Authorized Signature of Property Owner* (if different): Kerry A. Feltus

* Required

For Historic Preservation Projects Only – please check the box below left and acknowledge:

- I/We have read the **U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties** and understand that planning for and execution of this project must meet these standards.

Brief Project Summary

The Town of Concord requests Community Preservation Act funding in the amount of \$33,500 for Concord's continued participation in the Regional Housing Services Program. The Regional Housing Services Office (RHSO) was established in 2011 to oversee the administration of affordable housing programs in Concord and five neighboring communities. Since that time, the RHSO has expanded to oversee ten communities including Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Natick, Sudbury, Wayland, and Weston. The RHSO provides professional staff support to all ten communities in meeting the administrative and monitoring needs of their existing affordable housing programs, while also working with each community to develop additional programs and further regional housing efforts and goals.

Narrative

The Regional Housing Services Program is an invaluable resource to the Town for both developing new and maintaining existing affordable housing units. Affordable units are created with the understanding that they will remain affordable in perpetuity and require monitoring to ensure the administrative and regulatory requirements involved in maintaining their affordability are considered. As Concord's affordable housing inventory has grown, so too has the Town's need for expert assistance in developing, reviewing and monitoring these units. The Regional Housing Services Office (RHSO) was created in 2011 to address these needs by providing part-time professional affordable housing support to Concord and eight other communities, and recently expanded to ten communities total. The RHSO is now in its tenth successful year of operation and has relocated to renovated office space at 37 Knox Trail. The Office has grown as the affordable housing needs of its member communities has evolved, and continues to meet its anticipated budget and staffing expectations. The Town of Concord continues to serve as the lead community for the RHSO, through the Inter-municipal Agreement signed by all participating communities.

The RHSO meets the Community Housing needs of its member communities by providing expert staff and administrative services:

- 1) Monitoring - RHSO staff monitors existing affordable home ownership and rental units to ensure that they remain affordable and in compliance with their deed restrictions. RHSO staff regularly updates a database of Concord's existing affordable units which they created a few years ago to better assist the Town in monitoring and maintaining these units. The Town's monitoring responsibilities include the 715 units on the State's Subsidized Housing Inventory (SHI) as well as any locally produced affordable units.
- 2) SHI Administration - Listing SHI units is a detailed and sometimes complicated process, especially for those units created through a local initiative program (such as the special permit Planned Residential Development provision in the Town's Zoning Bylaw) which can be greatly assisted by the knowledge and expertise of professional housing staff. RHSO staff continues to assist the Town in maintaining Concord's SHI information and in adding new units to the inventory as they become available. Concord's SHI is now 9.97%, a decrease from last year's 10.43%. This year's SHI Inventory was calculated using 2020 census data (as opposed to 2010 data that had been used in previous years.) Concord is three units short of the 10% and the RHSO is assisting staff in planning for the creation of additional units.
- 3) HOME Administration – As recommended in the 2005 Comprehensive Long Range Plan, Concord has been a member of the WestMetro HOME Consortium since 2010, which provides Federal funds through the HOME program for community housing efforts in member communities. The RHSO represents Concord through all required consortium administrative requirements including bi-annual monitoring of HOME assisted units in

Concord (2 units), the annual action plan and CAPER report, participation in the Fair Housing testing efforts and other efforts.

- 4) Local Support for Concord's Housing Non-Profits - RHSO staff is also made available to Concord's affordable housing non-profits to assist and guide their efforts both in developing initiatives and completing specific projects. In addition, RHSO staff provide their expertise to assist non-profits in developing an understanding of the types of affordable housing units and levels of affordability most needed in the community. This past year the RHSO staff continued working with the Concord Housing Development Corporation (CHDC) on the development of the Assabet River Bluff property acquisition and development, the restart of the Junction Village project and the continued administration of the Small Grants Program, as well as the on-going support of the organization's administrative needs.
- 5) Resales of existing affordable housing units – Concord and other communities have observed an increase in the number of homeowners interested in selling their affordable units, which has led to the need for additional outreach and support services to these homeowners.
- 6) Regional Activities Support – Three years ago, the RHSO launched its website (www.rhsohousing.org/) which includes information on member communities existing affordable units, affordable housing assistance programs, and units currently available for purchase or rent. The RHSO continues refinement of the site and has since developed a member only portal that provides more in-depth project information. The RHSO also sponsors educational programs for affordable housing applicants and homeowners and training events for affordable housing property managers.

The RHSO has quickly become an indispensable tool for both meeting and sustaining Concord's affordable housing needs and goals. In addition to the services noted above, RHSO staff review and update Concord's affordable housing files; provide training and guidance on the resale and refinancing processes for affordable homeowner units; and work with the Town's Assessing Department to correct assessments on affordable units as needed. For those housing services that are needed only occasionally, the RHSO program also provides services on an a la carte basis. Concord has used these services for the resale of specific affordable housing units in the community and for completing plan updates (for the Community Preservation Committee and for the Housing Production Plan) when needed.

The RHSO program continues to be extremely successful in meeting the needs of its member communities on time and within its estimated budget. The RHSO's annual membership fees are based on the number of affordable housing units included on the State's Subdivided Housing Inventory (SHI) for each community.

Each year, the Town must anticipate the potential CPA funding needed for its membership in this program long before the RHSO has calculated the exact fees and staffing requirements for the upcoming year. This year, the Town anticipates that the membership fee will be similar to this year's expense and is budgeting an estimated \$67,000 for the program, a modest increase over last year. This includes funding from the town funds (\$33,500) and the \$33,500 from CPA. While other RHSO communities seek CPA funds for the full program amount, the Town proposes to match the CPA contribution to the program's membership costs from other Town funds. Any funds that are not needed to meet next year's membership expenses will be set aside for any unanticipated affordable housing questions that might require assistance from the RHSO's a la carte program services.

Please see the "Regional Housing Services Office –FY2022 Q4 Status Report" in Attachment A for further information on the work completed to date and the allocation of RHSO time by community.

CPC's Selection Criteria and Needs Assessment

This application meets the following Selection Criteria as found in the 2021 Community Preservation Plan:

a. The project's eligibility for CPA funding under the CPA legislation.

The application meets the criteria for Community Housing under the CPA legislation as it will provide funding for the support of community housing. This application proposes to fund the monitoring and administration of Concord's existing affordable housing stock in addition to assist in developing new affordable housing options, which will support both local and regional affordable housing goals.

b. The project's consistency with Town-wide planning efforts and reports that have received broad-based scrutiny and input.

The 2022 Housing Production Plan includes an action plan with 24 Housing Strategies. The RHSO is listed as a partner in implementation support for **Strategy #24 Foster outreach and education about local and regional affordable housing needs through a positive public relations campaign**. Continuing to Host and Support Membership in the Regional Housing Services Office is specifically identified as **Strategy #18**. The RHSO also consults and supports town staff with assigned strategies including the following:

- **Strategy #3: CMAHT pursues other land for the creation of affordable housing**
 - RHSO is currently developing options for how to pursue and develop 91B Main Street
- **Strategy #4: CMAHT negotiates increased affordable units in privately developed projects**
 - RHSO is available to review and assist with the affordable housing component of development agreements. Will assist with the upcoming review of the affordable housing component of the NOVO 40B project.
- **Strategy #8: Zoning consistent with MBTA Communities Law**
 - Supports staff with outreach efforts and provides input regarding the law's affordable component.
- **Strategy #20: Continue to participate in the west metro HOME Consortium.**
 - Supports town staff by providing administrative support in this effort.

This project also serves one of the housing goals found in the 2018 Envision Concord – Bridge to 2030 Comprehensive Plan. **Goal #1 - Develop realistic, achievable targets for preserving or creating housing of all types (beyond the Subsidized Housing Inventory)**. Working with the Concord Housing Authority, Concord Housing Development Corporation, Concord Housing Foundation, and other committees and organizations, including local employers, Hugh Cargill Trust Committee, etc., the Town should study the existing status of Concord's housing stock by type and price and create realistic quantitative goals with supporting policies and programs.

c. The project's support by relevant Town boards and committees and community groups and its consistency with recent Town Meeting actions.

The Concord Housing Authority and Concord Housing Development Corporation are both working with RHSO staff to develop and implement current housing projects. The Select Board has supported the funding of this program through the CPA and Town budget with an Inter-Municipal agreement has been signed by Town Manager Kerry Lafleur with the agreement of the

Board. Lastly, Concord's last ten Annual Town Meetings have voted to allocate CPA funding for this program.

- d. *The extent to which the project preserves, protects or enhances existing Town-owned open space, recreation, historic and/or housing assets.*

This project directly relates to the preservation, protection and support of Concord's existing community housing stock. A significant portion of the RHSO work in Concord has involved monitoring existing affordable housing units to ensure that the owners and renters continue to meet the requirements of their deed restrictions; maintaining a database to assist with this monitoring in the future; and administering Concord's existing units as listed on the State Subsidized Housing Inventory (SHI).

- e. *The extent to which the project serves multiple or underserved populations.*

This project directly supports under-served populations by working to monitor, support, and preserve Concord's existing low- and moderate-income housing and elder housing facilities, and by studying and analyzing the housing needs of low- and moderate-income households who have few other available means to enter the community.

- f. *Whether or not the project fulfills more than one purpose of the legislation: housing, historic preservation, open space or recreation.*

The project is not intended to fulfill any CPA eligible purposes beyond Community Housing.

- g. *Administrative and financial management capabilities of the applicant.*

The project will be administered through the Town of Concord's Department of Planning and Land Management (DPLM). DPLM is responsible for assisting in the development of the Town's affordable housing and administers its affordable housing programs. DPLM also works directly with local non-profits and developers when new residential housing developments are proposed. The Department has experience in administering CPA funded grants and projects, and the Town has completed all of the requirements of the program and grant funds to date.

- h. *The extent to which the applicant has successfully implemented projects of a similar type and scale or otherwise demonstrated the ability and competency to implement such a project.*

As noted above, the applicant has had a key role in developing and maintaining Concord's existing affordable housing stock and has extensive familiarity with the work proposed. The Planning Division has overseen numerous grant funded projects and has the expertise to implement a project of this scale. As this is an annual program, it is anticipated that not all funding allocations or project requirements may be complete before the next application is submitted.

- i. *Whether the applicant has site control or written consent by the property owner to submit an application.*

This is not applicable.

- j. *Demonstrated financial need.*

The Town will fund 50% of the program costs and will provide additional funding in the form of staff time and services. Without CPA funding to cover the remaining costs, some services provided in the DPLM budget would need to be significantly reduced to accommodate this project and its goals.

- k. *Whether or not there will be multiple sources of funding for the project, including leveraging of other public and/or private funding.*

The Town is allocating \$33,500 to cover 50% of the program fees this year and will continue to provide in-kind services in the form of staff time and program assistance.

- l. *The feasibility of the project plan and whether or not the most reasonable approach for implementing the project has been selected.*

The RHSO is already at work here in Concord and the Town benefits from the availability of their services. The program is performing as anticipated and the Town will continue to be an active participant in its further development.

- m. *The urgency of the project, the flexibility of the schedule and the impact of any delay in initiating the project.*

There is an urgent need for the Town to approve this funding to meet the membership fee requirements of the program. The Town receives a great deal of critical assistance from the program and has made a commitment to stay in the program. Any delays in the approval of the funds would require the Town to cut other services or programs to fund this project.

Additional selection criteria items n. through u. are not applicable.

Budget

The proposed overall budget of this RHSO application is \$67,000. The expense of running the RHSO is shared between the member communities on a percentage basis developed through an analysis of the community's existing affordable housing stock as listed on the State's Subsidized Housing Inventory (SHI) as well as the need for local support. The remaining funds in this account will be used for any "a la carte" services of the program required by the Town (such as assisting with unexpected opportunities to create or support affordable housing).

Feasibility

The most recent Inter-Municipal Agreement between Concord and the other member was signed on July 1st, 2023. This agreement included a new community, Natick, which increased the list of partner communities to ten. The Regional Housing Services Office officially opened in July 2011 and relocated to Concord in July 2014. The Town of Concord continues to serve as the lead community on an indefinite basis, as agreed to by the member communities. The current office location at 37 Knox Trail is convenient to the staff and member communities. The program is currently underway and performing as anticipated.

Timeline

This is an existing program which already provides support to the Town's programs on an ongoing basis. An advisory committee made up of representatives from each community meets on a quarterly basis to review the status of the program and discuss any regional projects or services. The RHSO staff also meets annually with the Town Managers and Town Administrators to provide an update on the program and receive feedback on various activities.



Regional Housing Services Office

Serving Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland, and Weston

Address: 37 Knox Trail, Acton, MA 01720

Website: WWW.RHSOhousing.org

Email: INFO@RHSOhousing.org

Phone: (978) 287-1092

July 28, 2023

To: John Mangiaratti, Colleen Doyle, Kerry LaFleur, James Malloy, Timothy Higgins, Greg Johnson, Jamie Erikson, Andy Sheehan, Michael McCall, Leon Gaumond, Janet Adachi, Kristen Guichard, Jeff King, Megan Zammuto, Lee Smith, Keith Bergman. Carol Kowalski, Abby McCabe, Paula Vaughn, Rick Lefferts, Bill Nemser, Amanda Loomis, Carmine Gentile, Robert Hummel, Imai Aiu, Sarah Rhatigan

CC: Jody Kablack, Christine McKenna Lok, Lara Plaskon, Jenicia Pontes

From: Elizabeth Rust

RE: Regional Housing Services Office – FY23 Q4 Status Report

This is the FY23 Q4 status report for activity from 4/1/23 through 6/30/23 for the Regional Housing Services Office, the inter-municipal collaboration between the nine towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland and Weston. Please let me know if you have any comments or questions.

RHSO Administration:

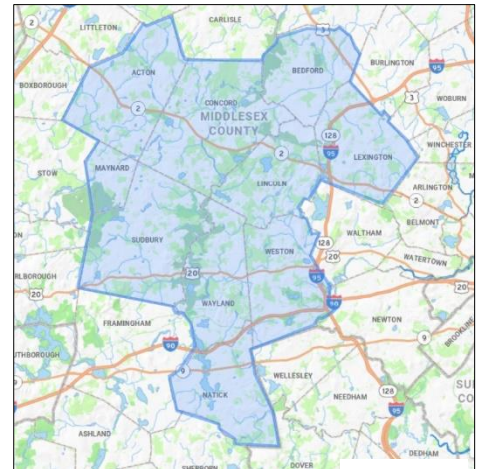
The RHSO is operating at full capacity, which translates to five part-time consultants and some administrative support from the Town, totaling 100 hours per week, or just short of 3 FTE’s – which is roughly the same level of support planned for FY24.

The RHSO Advisory Committee met in May, with a focus on MBTA zoning (congratulations again to Lexington for all their work on getting their zoning adopted), as well as community exchange, and RHSO FF24 plans.

April is Fair Housing month, and we participated in the training sessions offered by CHAPA as well as the 2023 Fair Housing and Civil Rights conference.

We started a monthly RHSO newsletter in May, highlighting items of general noteworthiness. Comments and suggestions VERY welcome.

The year ended with a new 3-year term of IMA for the RHSO, which welcomes Natick as the 10th RHSO community. The summary budget shows a slight increase in hours with the addition of Natick.



**RHSO
Service
Area**

	FY23 - ACTUALS	FY24 - BUDGET
Starting Balance	\$3,563	\$8,577
Revenue	\$320,828	\$401,063
	4,113 hours	4,774 hours
Expenses		
Staffing	\$293,118	\$375,063
Program expenses	\$2,095	\$5,000
Administrative Cost	\$20,601	\$21,000
Total Expenses	\$315,814	\$401,063
Ending Balance	\$8,577	\$8,577
Billing Rate	\$76.78	\$84.01

Regional Activities:



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Regional activities provide general housing resources, including trainings, reports, information and the website. The RHSO continues to administer assistance programs for our member communities including rental assistance, mortgage assistance and small grant programs, for total of \$1,055,000 for 325 households to date.

We completed our annual homeowner training on May 23. This workshop covered all manner of deed restriction requirements, including Monitoring Agents, refinancing, capital improvements, the Resale Process, and inheritance. We also had a real estate attorney join us for the detailed review of Condominium or Homeowner’s Association overview and questions. Along with the Tenant’s Rights Presentation Workshop held in April, we have completed our trainings for the year.

With the final release of the Census data in May, the RHSO is preparing one-page infographics for each member town. These will update the [last ones](#) done in 2016. We are piloting Bedford and plan to have a draft available in FY24 Q1.

The RHSO is often called upon for our expertise and this year again we presented at the MHP Housing Institute in June on describing the required marketing and lottery processes as part of the LIP process. We have been asked to co-sponsor CHAPA's Annual Regional Forum.

SHI, 40B Safe Harbor and Inventory Administration

Managing the SHI inventory is a key component of the RHSO services provided. A total of 1,101 units have been added to the Subsidized Housing Inventory for the members since joining the RHSO. Many (six of the nine) communities are in safe harbor through either meeting the 10% or through a certified Housing Production Plan, which provides a temporary safe harbor (one or two years). Five of the RHSO communities have approved Housing Production Plans, with Sudbury starting their HPP this spring.

The SHI denominator is the total number of year-round housing units as reported in the latest Census. The table below shows the SHI using both 2010 and 2020 denominator. We expect that EOHLIC will be issuing new SHI reports soon.

	2010 YR Housing Units, 2010	2020 YR Housing Units, 2020	Chg in hsgng units	Curre nt SHI nume rator	SHI%, using 2010	SHI%, using 2020	+/- 10% (2020)	FY23 SHI Changes	FY24 SHI Pipeline	40B Safe Harbor
Acton	8,475	9,151	676	737	8.70%	8.05%	-179	Craftsman Village (2)	26 Carlisle Rd (1), Parker Street (8)	
Bedford	5,322	5,424	102	989	18.58%	18.23%	447	Village at Bedford Woods (2)	Village at Bedford Woods (4)	Over 10%
Concord	6,852	7,172	320	715	10.43%	9.97%	-3	930 Main St (2)	Millrun (1), ARB (2), Comm Ave (1)	
Lexington	11,946	12,252	306	1,320	11.05%	10.77%	95		186 Bedford St (13), Waterstone Lexington (21)	Over 10%
Lincoln	2,130	2,754	624	298	13.99%	10.82%	23			Over 10%
Maynard	4,430	4,730	300	425	9.59%	8.99%	-48	Wisteria Lane (1)	Maynard Square (26), The Calvin (12)	



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Natick	14,052	15,563	1,511	1,494	10.63%	9.60%	-63		Graystone (3), 45 East Central (48)	
Sudbury	5,921	6,523	602	775	13.09%	11.88%	123			Over 10%
Wayland	4,957	5,227	270	477	9.62%	9.13%	-46		Hammond Road (1), St Anne's Church (60), 311 BPR (172)	
Weston	3,952	3,999	47	151	3.82%	3.78%	-249			
total	68,037	72,795	4,758	7,381			100			

Monitoring:

The monitoring program is a core service of the RHSO with ~6,000 units of SHI rental and ownership restricted housing across the communities. Of those, the RHSO monitors 369 ownership units, and 949 rental units. The MassHousing 40B ownership units have a third-party monitor assigned, and the Sudbury Housing Trust (staffed by the RHSO) is one such monitor, monitoring 69 units across 11 developments, of which 59% are located in RHSO communities. We have broken out the RHSO-based units in the table.

The 2023 Income Limits were released on May 15 2023, which went up by a modest 6%, generating a similarly modest increase in rents. With the new income limit publications, come the requests from the properties to increase rents. The RHSO reviews rent increases against the maximum in the regulatory agreements, and now understands that EOHLC will support municipal approval for a lower rent.

On the ownership side, the interest rates continue to increase (doubled in two years from 3.03% to now 6.71%), which has the effect of significantly decreasing sales prices.

Ownership Units: The ownership monitoring has finished for FY23, with the following steps:

- Self-certifications to each owner: We have completed three mailings and have achieved a 93% response, which is same as last year.
- Review the registry of deeds: Complete in December, violation letters sent in January, and corrective actions are on-going.
- Review owner mailing address versus town database, complete.
- Review on-line sites for rentals
- Provide annual certification reports to EOHLC (was DHCD), complete
- Send Welcome Letters to new owners (on-going)

6/16/2023	FY23 Self-Declaration				
	Sent from RHSO	Sent from SHT	Rec'd	Open	% rec'd
Acton	63	10	71	2	97%
Bedford	53	0	51	2	96%
Concord	75	2	74	3	96%
Lexington	26	0	26	0	100%
Lincoln	54	0	48	6	89%
Maynard	0	6	5	1	83%
Sudbury	9	23	30	2	94%
Wayland	22	0	18	4	82%
Weston	26	0	22	4	85%
<i>total</i>	<i>328</i>	<i>41</i>	<i>345</i>	<i>24</i>	<i>93%</i>



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Resales: One of the primary responsibilities of the monitoring agent is to locate eligible buyers upon resale of deed restricted ownership units. This falls to the municipality for units in the LIP Program, 40B units where the town is the named agent, or other locally restricted units.

The RHSO provides these resale services as part of its core monitoring efforts, and the town receives the resale fee associated with the transaction, which may be used to offset RHSO membership fees or purchase additional hours if the transaction is particularly time-consuming or difficult.

Of the 10 resale units that closed in FY23, 3 have sold off the program – meaning the affordable housing restriction was released. This is very unusual and generally occurs with the older units when there are difficulties locating an eligible purchaser due to significant repairs needed or rising condo fees. Newer deed restrictions generally are in perpetuity, but many older deed restrictions included a process for reverting to market rate when a buyer cannot be found in the time period. The town received ‘windfall profits’ for these units, and plan to invest those in future affordable housing.

Resale Summary	FY20	FY21	FY22	FY23	FY24
Acton	1	1		2	
Bedford		2	1*		1
Concord	2	3	2	1	2
Lexington	1			1	
Lincoln	1	3	3	4	1
Maynard					
Sudbury/SHT	1	2	3	1	1
Wayland		1	2*		
Weston	1	1		1	
	7	13	11	10	5
	\$31,231	\$70,982	\$29,222	\$34,755	
*Non-RHSO					

Rental Projects: On behalf of the member communities, the RHSO monitors Local Initiative Program (LIP) rental units, as required by the funding Regulatory Agreements.

Some municipalities (Acton, Bedford, Lexington, and Sudbury) negotiated annual payments with the developers to monitor their large LIP rental properties (nine properties in our service area). We have created a tracker to assist the towns collect \$30,316 annually. **We encourage all municipalities to negotiate an annual monitoring payment to the town for LIP rentals.**

In general, the rental monitoring review includes:

1. Reviewing rent increase requests and recommending approvals, in alignment with the new guidance.
2. Reviewing that the rents are assessed in accordance with the Regulatory Agreement.
3. Reviewing sample tenant files to ensure that tenant income is recertified using source documents according to the regulations.
4. Verifying that tenants are selected in accordance with Fair Housing requirements and current Affirmative Fair Housing Marketing Plans (AFHMP) including advertising requirements.
5. Verification that the units are maintained in accordance with applicable standards.
6. Providing rental monitoring report to Town and EOHLCD (was DHCD), as required.
7. Follow-up during the year on compliance findings and recommendations, as well as unit changes and other requests.

The below table provides the detail schedule for the rental monitoring.



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	Town	Rental Development Name	SHI units	Restricted Units	Subsidy Program	Monitoring
1	Acton	Scattered sites (AHA)	8	8	LIP 40B	FY24
2	Acton	Inn at Robbins Brook	3	3	LIP-LAU	FY24
3	Acton	Avalon	86	22	LIP-40B	FY24
4	Bedford	Village at Concord Road	12	3	LIP 40B	FY24
5	Bedford	Patriot Place	10	7	LIP 40B	FY24
6	Bedford	Village at Taylor Pond	200	50	LIP-LAU	Complete FY23
7	Bedford	Bedford Village	96	96	CPA	FY24
8	Bedford	Avalon at Bedford Center	139	35	Local	FY24
9	Bedford	Plank Street	52	13	Placeholder	Placeholder
10	Concord	Concord Prescott	350	88	LIP 40B	COMPLETE FY23
11	Concord	Concord Park	0	16	Local	COMPLETE FY23
12	Concord	405 Old Bedford Road (CHA)	4	4	LIP LAU	FY24
13	Concord	Brookside Square	74	8	LIP-LAU	In process
14	Lexington	Avalon at Lexington Hills	387	97	LIP 40B	COMPLETE FY23
15	Lexington	Avalon Lexington	198	56	Local	COMPLETE FY23
16	Lexington	LexHAB Scattered Sites	48	48	various	COMPLETE FY23
17	Lexington	186 Bedford Road	13	4	LIP LAU	Placeholder
18	Lincoln	Commons	30	8	LIP 40B	FY24
19	Lincoln	Oriole Landing	60	15	LIP LAU	FY24
20	Maynard	Halstead Maynard (the Vue)	180	22	LIP LAU	COMPLETE FY23
21	Maynard	Maynard Point, 42 Summer	24	6	LIP 40B	COMPLETE FY23
22	Sudbury	Willis Lake (SHA)	1	1	LIP-LAU	COMPLETE FY23
23	Sudbury	Avalon	250	63	LIP 40B	COMPLETE FY23
24	Sudbury	Cold Brook Crossing	101	26	40R	COMPLETE FY23
25	Wayland	Alta (River's Edge)	218	55	LIP LAU	FY24
26	Weston	WAHFI: Church, Jones, Pine, Viles	6	6	LIP LAU	COMPLETE FY23
27	Weston	Warren Ave	7	5	LIP 40B	COMPLETE FY23
28	Weston	Merriam Village	62	5	LIP LAU	NOT IN SCOPE
			2619	770		

Town-Specific Monitoring

Other monitoring efforts include assisting residents with refinancing, resales, capital improvements, as well as maintaining the inventory with new projects, new owners, and other general updates relating to maintaining compliance with affordable housing restrictions of existing properties.

In Acton: Closed the home to an Eligible Buyer at 212 Central with a closing in May. Reviewed and recommended rent approval for Avalon.

In Bedford: Continued assisting the Bedford Municipal Housing Trust with the Winterberry property and the award to Habitat. Started the resale process for a unit at Carter Way. Reviewed refinancing request materials for home in Bedford Meadows. Reviewed and recommended rent approval for Avalon, Village at Taylor Pond.

In Concord: Completed significant activity on resales - Burke Farm: Closed the home to an Eligible Buyer with a closing May; Baker Homes: Completed marketing, lottery, obtained commitment for buy-down and located an Eligible Buyer; Elm Brook: Started marketing, held lottery and located an Eligible Buyer. Completed monitoring of Concord Park and Prescott (in support of the property transferring ownership), reviewed and recommended rent approval for Prescott.



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In Lexington: Closed the home to an Eligible Buyer at 212 Central with a closing in May. Acting as the town agent for sales at Muzzey School units 116 that closed in the reporting period, and unit 103 which continues marketing. Reviewed and recommended rent approval for Avalon.

In Lincoln: Closed the home to an Eligible Buyer at Minuteman Commons, finally with a closing in May. Started the resale process at a unit at Battle Road Farm.

In Maynard: No monitoring activity in this reporting period. Reviewed and recommended rent approval for Halstead and Maynard Point.

In Sudbury: Completed monitoring at Cold Brook Crossing. Continued working with the Trust, EOHLIC, and Habitat to ready the home on Dutton Road for resale marketing, and receiving approval to start. Reviewed and recommended rent approval for Avalon and Cold Brook Crossing. Reviewed and recommended approval for a deed transfer to a trust at Grouse Hill.

In Wayland: Reviewed and recommended rent approval for Oxbow Alta, which was a request to bring rents up to years for some tenants, since leasing started under the 2021 income limits and rents. This timing resulted in a 20%+ increase for some tenants. We are working with the property owner to see what can be done.

In Weston: Completed monitoring at the WAHFI units at Church, Jones, Pine, and Viles St, updated valuation for Love Lane property.

HOME Support:

The HOME support category assists 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 ~\$2,700,000 since FY13.

The HOME monitoring schedule

	Town	Development Name	HOME Units	Subsidy Program	Monitoring Year
1	Bedford	20 Railroad	8	HOME	FY24
2	Bedford	447 Concord Road	12	HOME	FY23 - Complete
3	Bedford	Ashby	4	HOME	FY23 - Complete
4	Concord	Thoreau St (CHA)	1	HOME	FY23 - Complete
5	Concord	Peter Bulkeley (CHA)	28	HOME	FY24
6	Lexington	561 Mass Ave	1	HOME	FY23 - Complete
7	Lexington	Pine Grove Village	5	HOME	FY24
8	Lexington	Keeler Farm	1	HOME	FY24
9	Sudbury	Coolidge (I and II)	3	HOME	FY24
		TOTAL	63		

In this reporting period the RHSO attended the quarterly HOME meeting in May, as well as:

- Fair Housing: Participated in the bi-monthly status meeting for the Housing Discrimination Testing initiative. To date, 34 tests have been completed in every consortium community. Results are being evaluated.



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- Bedford: Completed one additional case for the Bedford Initial Rental Assistance Program (TBRA). Completed the Sub-recipient Agreement. Completed monitoring for 447 Concord Road.
- Concord: Completed the Sub-recipient Agreement. Completed monitoring for Thoreau St.
- Lexington: Completed the Sub-recipient Agreement. Completed materials to redirect funds to a tenant-based rental assistance program for first month and security deposit through the Substantial Amendment Process. Working with Douglas House on approving rent increases. Completed the monitoring for 561 Mass Ave.
- Sudbury: Completed the Sub-recipient Agreement. Working to redirect funds to a tenant-based rental assistance program for first month and security deposit through the Substantial Amendment Process. On Hold awaiting Sudbury direction.
- Wayland: Completed the Sub-recipient Agreement. Completed the Environmental Review with advertising for 12 Hammond.

Local Support:

Successful votes at this year's Annual Town Meetings included solar panels for senior and low-income housing in Lexington and Acton (which also added EV charging stations), property acquisition prefunding in Lexington and Sudbury, design and creation of new housing on town land in Concord, and support for residents of subsidized housing in Bedford. The 2023 community housing allocations totaled over \$5.1 million, with 53% as prefunding for new development to local Housing Trusts and non-profits.

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

Acton: Continued monthly status meetings. Supported the ACHC by attending meetings, taking minutes, and following up as needed. Continued work on feasibility study for establishing a housing trust focused on creating SHI units through buy-down and rehab – by reviewing condominiums sales data for the last few years. Reviewed and commented on the proposed LIP application for Parker Street and had subsequent discussions with the property owner.

Bedford: Attended Bedford Housing Partnership and Bedford Municipal Affordable Housing Trust meetings and responded to inquiries on agenda items as requested. Supported the Small Grant Program by reviewing applicants for the spring grant cycle. Continued administration of the Bedford Rent Relief Program, for the second round of funding. The first round committed \$60k for 12 households, and the second round commits another \$60k, for 1 household to date. Provided comments on the Carlisle Road project.

Concord: Convened two Concord Housing Roundtable sessions in April and then in June. Continued monthly status meetings. Continued assisting the Town and CHDC with the Assabet River Bluff project, an open space and housing joint initiative. For 406 Old Marlboro Road, supporting the CHDC as landlord with property maintenance (with HVAC system replacements), utility and other payments, and other landlord functions. For the new construction, continued the design and planning in support for applying for the zoning permit. Generally assisted the CHDC with staff support by preparing agendas and meeting materials, scheduling and convening meetings, support recruiting for new board members, working with bookkeeper and CPA on financial statements and tax filings, filing the annual report and Form ABC, as well as administering the CHDC Small Grant Program (assisting with the review and award of 5 grants in this reporting period). Reviewed the new 40B proposal at Baker Avenue.



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Lexington: Continued monthly status meetings. Attending Lexington Municipal Affordable Housing Trust to assist in their start-up and provide scoping for developing an Action Plan. Assisted town staff by providing sample 2023 rents and sales prices for developer inquiries. Convened the Lexington Housing Roundtable in June. Supported planning staff at Lexington Town Meeting in regards to the Special Permit Residential Development bylaw.

Lincoln: Supported the Lincoln Foundation special grant programs aimed at assisting low income owners with sharp increases in condominium fees at Battle Road Farm by processing the condo fee payments and opening a small grant program grant cycle.

Maynard: Continued monthly status meetings. Completed the eligibility, lottery and awards for the next iteration of the Maynard Rent Relief Program, which (in its first year) will provide \$500 per month for three years to four tenants. Payments started for June rent.

Sudbury: Supported the Sudbury Housing Trust by: attending meetings, preparing financial reports, administering the Small Grant Program by assembling and reviewing requests, presenting for review, preparing award materials and payment request packages. Continued final administration for the Sudbury Rent Relief Program rounds (SRRP) by reviewing and qualifying applications, preparing and obtaining approvals on Participation Agreements, and submitting purchase orders and monthly payment invoices. This significant program has committed \$430,000 in both CPA and ARPA funds to assist 145 tenants. The current phase is assisting 73 tenants monthly. Continuing the implementation of Sudbury's Mortgage Assistance Program using state subsidy (to date, 8 applicants, \$24,000) . In addition, under the Sudbury Trust umbrella, the RHSO performed lottery and monitoring services for other entities in the region, as follows:

- Started marketing for the units at Millrun in Concord
- For recertifications: Completed Corey St in Melrose and started Plainville.
- Completed the sales for the units at the Graystone in Natick, closing on the second of three in January.
- Closed on the much delayed second unit at Pine Hill in Harvard, and prepared for a second lottery.
- Continued the sales for the Wellington Woods, closing on 3 additional units (closed 12 of the total 20).

Wayland: Track down history and contact info on Launcher Way property for Assistant Town Manager.

Weston: Continued monthly status meetings and attended HPP Implementation Committee meetings. Reviewed LIP application for Silver Hill 269 North Ave, and started local preference justification. Supported the Weston Housing Trust with preparing materials for a renewed Small Grant Program, with completing the Grant Agreement with Habitat for 0 Wellesley. Additionally provided the Weston Housing Trust with staff support by preparing agendas and meeting materials, scheduling and convening meetings. For Warren Avenue: Completed unit inspections; continue financial review including budget, expenses and capital plan; defining on-going tenant and management processes.



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FY23 Tracking:

We have finished the year, and completed the tracking of hours by RHSO member community, as shown in the table to the right.

The RHSO delivered 57.50 less hours than purchased by the member communities, due to staffing delays. Correspondingly the RHSO delivered 58.50 less hours to Sudbury in FY23, and has been 'refunded' this towards their FY24 fee. This

All other communities fell in the '+/-' 10 hours, which is forgiven.

As always, we monitor the hours monthly, and are pleased to provide interim reporting if needed.

	FY23 Actual	FY23 Budget	Actual v Budget	Monthly Budget	Annual Budget
Acton					
Monitoring	131.75	105.00	26.75	8.75	105.00
Local Support	161.25	177.00	(15.75)	14.75	177.00
ACHC	63.50	110.00	(46.50)	9.17	110.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	438.75	442.00	(3.25)	36.83	442.00
Bedford					
Monitoring	164.75	128.00	36.75	10.67	128.00
HOME administration	33.75	40.00	(6.25)	3.33	40.00
Local Support	148.00	106.00	42.00	8.83	106.00
BHP/MAHT	0.00	105.00	(105.00)	8.75	105.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	428.75	429.00	(0.25)	35.75	429.00
Concord					
Monitoring	169.25	87.00	82.25	7.25	87.00
HOME administration	36.75	80.00	(43.25)	6.67	80.00
Local Support	232.25	278.00	(45.75)	23.17	278.00
CHDC	114.50	275.00	(160.50)	22.92	275.00
HPP	133.50	0.00	133.50	0.00	0.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	768.50	770.00	(1.50)	64.17	770.00
Lexington					
Monitoring	183.50	153.00	30.50	12.75	153.00
HOME administration	52.50	40.00	12.50	3.33	40.00
Local Support	107.25	173.00	(65.75)	14.42	173.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	425.50	416.00	9.50	34.67	416.00
Lincoln					
Monitoring	147.00	190.00	(43.00)	15.83	190.00
Local Support	53.75	52.00	1.75	4.33	52.00
Lincoln Board/MAHT	22.50	23.00	(0.50)	1.92	23.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	305.50	315.00	(9.50)	26.25	315.00
Maynard					
Monitoring	29.00	40.00	(11.00)	3.33	40.00
Local Support	30.50	31.00	(0.50)	2.58	31.00
Maynard AHT	17.50	30.00	(12.50)	2.50	30.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	159.25	151.00	8.25	12.58	151.00
Sudbury					
Monitoring	75.00	85.00	(10.00)	7.08	85.00
HOME administration	20.50	40.00	(19.50)	3.33	40.00
Local Support	91.50	208.00	(116.50)	17.33	208.00
Sudbury AHT	619.25	564.00	55.25	47.00	564.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	888.50	947.00	(58.50)	78.92	947.00
Wayland					
Monitoring	18.00	30.00	(12.00)	2.50	30.00
HOME administration	39.75	40.00	(0.25)	3.33	40.00
Local Support	17.75	31.00	(13.25)	2.58	31.00
Regional Activities	25.25	25.00	0.25	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	157.75	151.00	6.75	12.58	151.00
Weston					
Monitoring	134.50	53.00	81.50	4.42	53.00
Local Support	122.00	104.00	18.00	8.67	104.00
Weston AHT	145.25	285.00	(139.75)	23.75	285.00
Regional Activities	24.25	25.00	(0.75)	2.08	25.00
Admin	57.00	25.00	32.00	2.08	25.00
Total	483.00	492.00	(9.00)	41.00	492.00
Totals	4055.50	4113.00	(57.50)	342.75	4113.00