



COMMUNITY PRESERVATION ACT APPLICATION FOR FUNDING

Regional Housing Services Office

Megan J. Zammuto

Assistant Town Administrator / Executive Director of Municipal Services

Community Preservation Act
Town of Maynard
Final Application for Funding
Regional Housing Services Office

Introduction

The Town Administrator's Office is submitting this proposal to the Community Preservation Committee (CPC) for funding to join the Regional Housing Services Office (RHSO).

The RHSO serves its member towns by assisting with the municipal function of affordable housing, including proactive monitoring, program administration, project development and resident assistance.

RHSO membership includes the Towns of Acton, Bedford, Concord, Lexington, Sudbury, Wayland and Weston. Many of these communities use Community Preservation Act (CPA) funding to pay their share of these services.

This service is authorized through Inter-Municipal Agreements among the member towns.

Project Description:

1. Project Category: Community Housing
2. CPA Funding Scope

The total cost of the project is \$11,000 for FY2021. The request to the CPC is \$9,500, the additional \$1,500 will be supplemented through the Office of Municipal Services budget.

3. Goals: What are the specific objectives of the proposed project? Who will benefit and why? How will success be measured?

Goal 1: Fulfill State and agency reporting and requirements

- Monitor database of deed restricted units;
- Monitor regulatory agreements;
- Send and compile self-declaration reports for ownership units;
- Maintain RHSO public website and provide members only portal;
- Prepare and submit certification reports to DHCD;
- Prepare and submit subsidized housing inventory reports to DHCD.

Goal 2: Carry out local responsibilities

- Work with DHCD, developers and housing-lottery agents for dedication of SHI units;
- Update the Town's assessed value of deed restricted properties;
- Provide educational opportunities for residents;
- General local support and housing program administration to the Maynard Affordable Housing Trust (AHT) and the Office of Municipal Services.

- Provide technical assistance to AHT when reviewing 40B developments
- Assist in the Implementation of the Housing Production Plan approved by the Board of Selectmen and Planning Board in 2016

4. Community Need: Why is this project needed? Does it address needs identified in existing Town or regional plans or non-profit organizations, or needs raised in community discussions?

Since the Town of Maynard has adopted the Housing Production Plan and adopted an Inclusionary Zoning By-law as one of the recommendations of that plan, there has been an increase in housing production. Maynard has added approximately 22 affordable units this year and the volume of work and statutory responsibility has increased and grown more complex. The 22 affordable units were created under the Local Initiative Program (LIP) which requires the municipality to annually certify in writing to the Department of Housing and Community Development (DHCD) that each of the Low and Moderate Income Units continues to be Low and Moderate Income Units have been maintained in a manner consistent with the regulations and guidelines.

It is crucial the Town's affordable housing data ("subsidized housing inventory" or "SHI") be current, accurate and efficiently administered. The SHI is used to measure a community's stock of low-or moderate-income housing for the purposes of M.G.L. Chapter 40B (the Comprehensive Permit Law which requires a 10% minimum of SHI units). Currently Maynard's SHI is 8.6%. RHSO is an efficient and proven resource that can help us meet our affordable housing goals and properly administer our SHI.

In addition to the creation of new SHI units, it is crucial for the Town to preserve its existing SHI. RHSO funding will provide services to monitor existing housing and prevent the loss of SHI units, and provide a level of focused expertise in affordable housing that town staff does not possess.

Participation in the Regional Housing Services Office would help address needs identified in the following plans:

A) Meet objectives Housing Production Plan approved by the Board of Selectmen and Planning Board in 2016

1. Provide opportunities for housing of various types to meet anticipated needs within the Town's limited land resources.
 - Assist those who are of moderate financial resources by encouraging assisted housing and types of housing within their means.
2. Encourage retention and improvement of the existing housing stock of the community, which includes a variety of housing types.

B) Meet objectives of the Community Preservation Plan (2007)

According to the Town's Community Preservation Plan (2007), the CPC, in conjunction with the Housing Authority and others, has identified the following community housing goals:

- Provide and preserve community housing that promotes age and income diversity. To the extent possible, universal design features should be incorporated into the construction of such housing.
- Create new and preserve existing community housing that is well designed and maintained, is of high quality, and is based on sound planning principles.

- Disperse community housing throughout the town.
- Create housing in neighborhoods that currently have little or no affordable housing.
- Create new and preserve existing community housing that will contribute to the State mandated minimum SHI target of 10% .
- Provide community housing opportunities that give priority to local residents, seniors, Town employees, and families of students enrolled in the Town public schools.
- Re-use existing buildings or use previously developed or Town-owned sites for new community housing.

C) Meet objectives of the Draft Master Plan (10.2.19 Draft)

Housing H1: Maintain and encourage a range of housing options, including those that are accessible to persons and households of various ages, abilities, and economic means.

- Continue to implement strategies outlined in the Maynard Housing Production Plan to increase the stock of housing that is affordable to residents of various economic means and meet or exceed the Commonwealth’s affordable housing goals.
- Track progress of the Inclusionary Housing By-law to assess its effectiveness.
- Explore mechanisms to protect existing lower-cost housing options.

H3: Support mixed-use housing in downtown, as appropriate to the area’s scale, density, and aesthetic character, in a manner that does not detract from its economic and cultural functions.

- Assess recent developments within the Downtown Overlay District to ensure this zoning tool is achieving its intended purpose, as it pertains to housing.

D) Meet objectives in the Community Development Principles

Principle #5 Expand Housing Opportunities

- Maynard continues as a diverse community which offers a broad range of housing options to its residents.
- Maynard is compliant with government mandates regarding affordable housing.
- Achieve and maintain compliance with Chapter 40B; investigate and pursue other regulatory and non-profit opportunities to increase affordable housing.

5. Community Support: What is the nature and level of support and/or opposition for the project? In particular, with which Town Boards/Committees/Departments or community organizations have you consulted/collaborated.

Participation in the Regional Housing Services Office was discussed with the Affordable Housing Trust (AHT) during their July 31st meeting. The AHT suggested that membership with the RHSO would best be done by the Town rather than the AHT as the organizations include participation and coordination among member communities’ town administrators and managers.

This project has the full support of the Town Administrator’s Office, and the Office of Municipal Services.

6. Budget: What is the total budget for the project and how will CPA funds be spent? Provide written estimates to substantiate proposed costs. Include a 2- to 5-year budget, if appropriate. (NOTE: CPA funds may NOT be used for general maintenance purposes.)

The total budget for the FY21 membership of the RHSO for the Town of Maynard is \$11,000.

As a participating municipality, Maynard will continue to proportionally share the total costs of operating regional housing services. The proportional share is determined based on the percentage of hours planned to support each municipality for core services as represented in the fee schedule. Supplemental services proposed throughout the year will be invoiced outside of this agreement for payment for additional hours in excess of the allotted hours. An example of that would be monitoring services for specific 40B project with funds provided by the project developer. If there are unused hours at the end of the second year they will be refunded to the community. The expected funds would be held by the Town with payments made to the regional housing service provider by the Town on an annual basis.

Proposed Maynard Services

Description	Hours
Monitoring	35
Local Support	60
Regional Services	20
Administration	20
Total	135

7. Funding: What other funding sources are committed or under consideration? Include any commitment letters or describes other efforts to secure funding for this project. Is there revenue potential for this project?

The Town of Maynard currently contracts with ECR Enterprises for housing consulting services. The average annual expenditure is approximately \$1,500 which is paid out of the Office of Municipal Services Professional Contract budget. Although increasing our services with ECR Enterprises is an option, joining the RHSO is the more fiscally responsible choice as all administrative functions are regionalized. The Office of Municipal Services will continue to contribute \$1,500 to managing affordable housing.

Regional Services Housing Trust Request – FY2021

CPC Request	\$9,500
OMS Budget	\$1,500
Total Cost	\$11,000

8. Timeline: What is the schedule for project implementation? Include a timeline for critical elements, expenditures, and receipt of other funds, if any.

1. RHSO Advisory Committee would vote to accept Maynard into the RHSO at their quarterly meeting in February, 2020.
2. Concord Town Manager acting as the RHSO lead community, would approve including the Town of Maynard in the RHSO.
3. Maynard Board of Selectmen sign the Inter Municipal Agreement in May, 2020.
4. The Town of Maynard would receive an invoice in July, 2020 for the FY2021 year.

9. Implementation: Who will be responsible for implementing the project? Who will manage the project? Does the proposed project manager have relevant experience? Who else will be involved in project implementation and what arrangements have been made with them?

The Town envisions the Board of Selectmen and the Town Administrator entering into the Inter-municipal agreement for FY 2021. The Selectmen would sign the agreement. During the term of the agreement, core housing services would be provided with an allocation of approximately 135 hours under the direct supervision of the Office of Municipal Services.

Assistant Town Administrator and Executive Director of Municipal Services, Megan Zammuto will be responsible for managing the Town's partnership with the RHSO. Office of Municipal Services staff will assist with specific projects. Town staff has a general knowledge of affordable housing principles; however, they do not have the relevant experience to undertake affordable housing management for Maynard units. Joining the RHSO would allow staff to work with affordable housing professionals and learn from best practices in neighboring communities.

10. Maintenance: If ongoing maintenance is required, who will be responsible and how will it be funded? Please include a 5-year budget and documentation of commitment.

There is no specific maintenance with this request.

11. Other information

Included please find information about the RHSO.

REGIONAL HOUSING SERVICES OFFICE

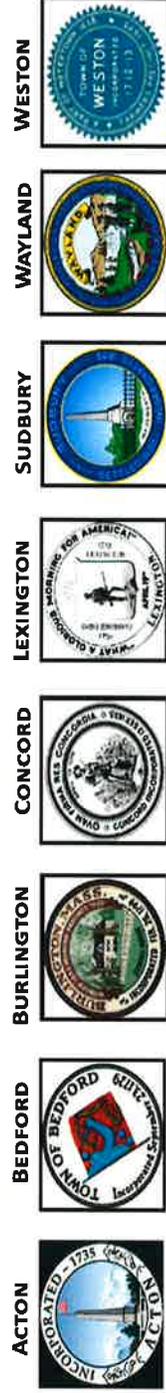
Overview



*Regional Agreement between Acton, Bedford, Burlington, Concord,
Lexington, Sudbury, Wayland and Weston*

RHSO Update – Service Model

REGIONAL HOUSING SERVICES OFFICE, ESTABLISHED 2011



- Member Towns receive housing services for an annual fee per Inter- Municipal Agreement:
 - Monitoring
 - Inventory Management
 - Program Development and Administration
 - Assessment Valuations
 - Local Support (Studies, analysis, feasibility, project review)
 - RHSO Website
 - Regional Collaboration


Town of Concord
Lead Community

RHSO Personnel deliver services through Lead Community.

Membership Fee covers all staffing, and administrative expenses, such as accounting, office support, mail, technology, etc

Member Town Statistics (FY18)				
	Housing Units	Restricted/SHI Units	Restricted Ownership	SHI%
Acton	8,475	568	68	6.70%
Bedford	5,322	974	54	18.30%
Burlington	9,627	1283	27	13.33%
Concord	6,852	804	71	11.73%
Lexington	11,946	1328	93	11.12%
Sudbury	5,921	664	37	11.21%
Wayland	4,957	254	54	5.12%
Weston	3,952	167	29	4.23%
Total	57,052	6,042	323	10.59%

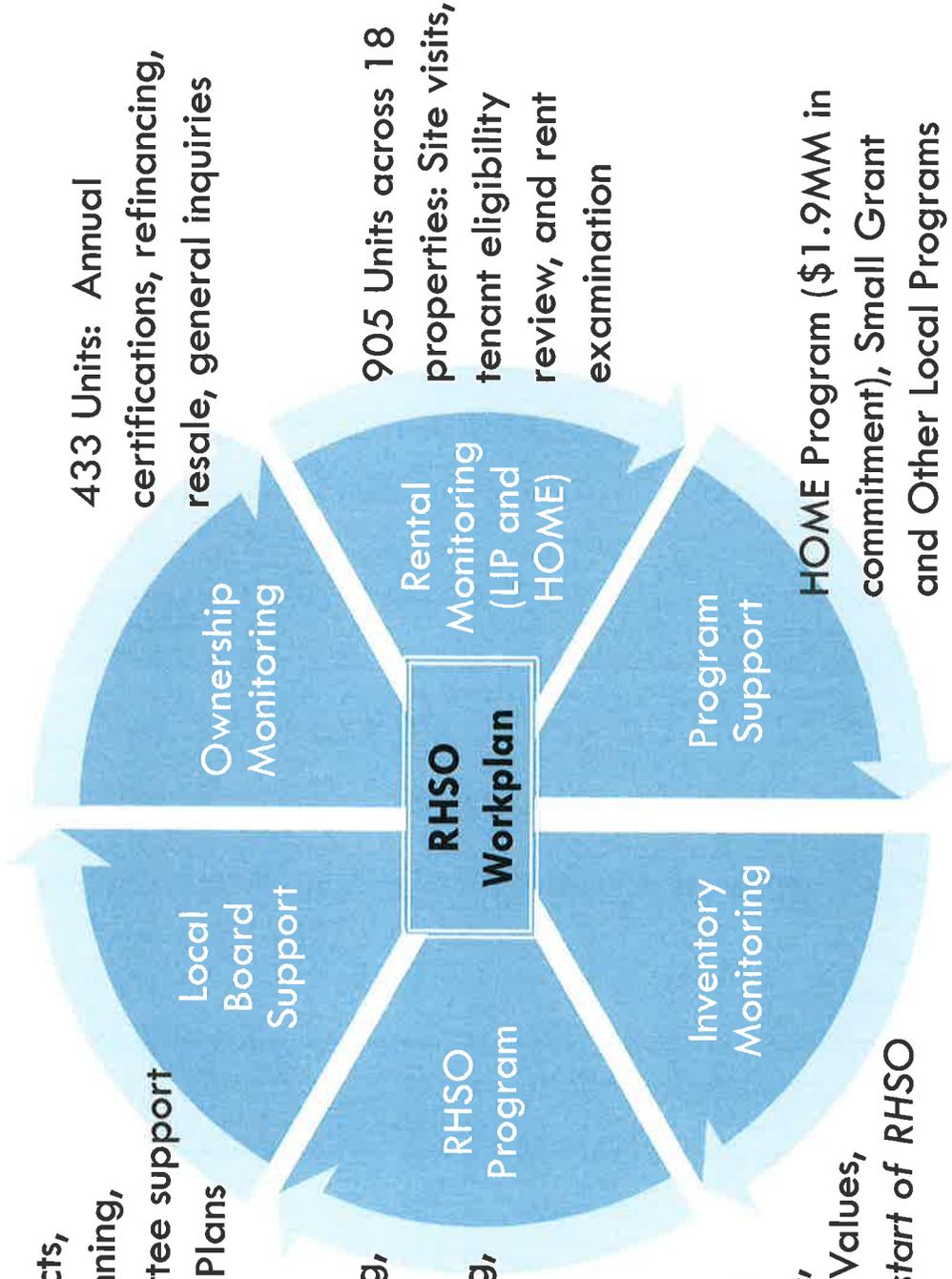
RHSO Workplan



Development projects,
Feasibility and Planning,
Boards and Committee support
Housing Production Plans

Homeowner Training,
Property Manager
support and training,
RHSO Website

Review Compliance,
Maintain Inventories,
Provide Assessment Values,
980 SHI units since start of RHSO



RHSO Update – Website

The screenshot displays the website for the Regional Housing Services Office (RHSO). The browser address bar shows the URL <https://www.rhsohousing.org>. The page features a blue header with the organization's name and a navigation menu with links for Home, About RHSO, Member Towns, Resident Services, and Affordable Housing Opportunities. A search bar is located in the top right corner. Below the navigation, there are several content blocks: a 'Mission Statement' box, a large photograph of a ribbon-cutting ceremony, and a 'Ribbon Cutting in Action' caption. The footer contains contact information for the office and mailing address, along with links to a virtual towns and schools website and a login page. The Windows taskbar at the bottom shows the system tray with the date and time set to 12:23 PM on 7/25/2018.

Regional Housing Services Office

Home | About RHSO | Member Towns | Resident Services | Affordable Housing Opportunities

Search

Select Language

HP SimplePass

Page | Safety | Tools

Mission Statement

The Regional Housing Services Office provides the member communities of Acton, Bedford, Burlington, Concord, Lexington, Sudbury, Weymouth and Weston with affordable housing support and information.

Ribbon Cutting in Action

Office • 37 Knox Trail • Acton, MA 01720 • 978-287-1092
Mailing • 2352 Main Street • Suite 2 • Concord, MA 01742
[Website Disclaimer](#) | [Virtual Towns & Schools Website](#)

[Login](#)

<https://www.rhsohousing.org/home/bulletin/ribbon-cutting-acton>

12:23 PM 7/25/2018

RHSO Update – Summary



- RHSO successfully completing 7 years of operation

Proactive Compliance Monitoring

- Preserve Units
- Maintain Housing Inventory

Resource Efficiency

- Centralize Information for existing and prospective residents
- Leverage Resources, Resource Continuity

Regional Approach

- Common Solutions for Common Challenges
- Enhance Municipal Services



Regional Housing Services

Overview / Summary

Regional Housing Services are multi-jurisdictional efforts are a collaborative approach to provide expertise, skills and staffing capacity for a variety of tasks related to certifying, tracking and promoting housing to more than one jurisdiction. There are three (3) such collaborations in Massachusetts:

- *Regional Housing Services Office* - serving Acton, Bedford, Burlington, Concord, Lexington, Sudbury, Wayland and Weston.
- *Metro West Regional Housing Consultant* (serving Hudson, Hudson Affordable Housing Trust, Stow, Boxborough, Bolton, Littleton and Devens Enterprise Commission / MassDevelopment)
- *Metro North RHSO* (serving Reading, North Reading, Saugus and Wilmington)

History

There was a gap in expertise, and staff capacity for many Towns in eastern Massachusetts that are required to keep up to date on housing related administrative and tracking responsibilities. To address this need, in 2011 the **Metropolitan Area Planning Council** (MAPC) conducted a study of possible services that a regional housing office might provide, assisting with the formation of the first regional group. The Regional Housing Services Office was formed through an **Inter Municipal Agreement** (IMA) by 6 communities generally along Route 128 west of Boston. Sudbury was the initial lead community, establishing a Revolving Fund through Town Meeting. The town of Concord is now the lead community for that RHSO. In or around 2013, several communities along and near Route 495 issued an RFP for Regional Housing Consultant (RHC) services and chose Metro West Collaborative Development Inc. to serve as the MetroWest RHC. The town of Hudson is the lead community for that collaboration. In 2018, four communities north of Boston created the Metro North RHSO, with the town of Reading taking the lead. Many of these towns use **Community Preservation Act** (CPA) funding to pay their share of these services, and some use other funding sources.

The entities that participate in these regional housing service organizations agree to share costs and expenses. Table 1 below summarizes some of the key features of their agreements. Copies of the most recent IMAs are listed at the end of this summary and available on the Housing Choice web pages.



Regional Housing Services

Table 1. Summary of Regional Housing Services providers

Name	Fee Structure	IMA / Contract Term	Scope of Services
RHSO Concord Acton Bedford Burlington Concord Lexington Sudbury Wayland* Weston	Based on estimated hours (FY 18 range of 155 hours to 830 hours) based on past experience and understanding of anticipated projects 2018 contract: \$212,069 for 2,980 hours *Wayland has a separate contract for services	IMA: 3-year term, option to renew for additional 3-year terms Contract: Annual	Monitoring SHI Administration HOME Program administration Local Support Regional Activities Shared Website – RHSOhousing.org
Metro West RHC Bolton Boxborough Devens Enterprise Commission Hudson/Hudson AHT Littleton Stow	Combination of hours for local services, plus regional activities and monitoring. 2017 annual contract: \$30,240 for 432 hours	IMA: 3 years Contract: 1 year with 2 one year renewal options	Local Support Monitoring Regional Services
Metro North RHSO North Reading Reading Saugus Wilmington	Specific percentage of salary and expenses from estimated time that will be spent in each community FY 2019 contract: \$62,830 FY 2020 estimate: \$64,715	IMA: 2-year term (option to renew 6 times in 2-year increments) Contract: none -- Town of Reading staff provides services	Monitoring SHI administration Local Support Regional activities

The IMAs address a variety of issues related to the provision of regional housing services:

- Specific scope of services for the service provider
- Duties of the lead agency
- Funding details/Membership fee structure
- Allocation of hours, ability to make adjustments (within the billing year and in subsequent years)
- Ability to contract for supplemental services
- Voting on new member Towns/Cities
- Withdrawal
- Advisory / Interagency Committee Oversight



Regional Housing Services

Three Different Staffing Approaches

Each of these regional housing service providers has a different management and staffing approach. The Concord-based RHSO is staffed by four independent contractors who each contract with the Town of Concord on an annual basis. In the first iteration of this RHSO, the Town of Sudbury was the lead agency and provided staff services, however that model has evolved to using independent contractors. For the Concord-based RHSO, the Town of Concord provides office space, IT/Website hosting and contracting. The FY19 billing rate is \$69/hour.

Metro West Collaborative Development Inc. is a non-profit Community Development Corporation (CDC) that develops and administers affordable housing projects. They were selected as the contractor for the Metro West RHC in 2013 and again in 2017. They operate as a contractor, wherein the lead Town of Hudson is the contractor and fiscal agent, but it does not provide office space to the RHC. The billing rate is \$70/hour.

The Town of Reading is the lead for the Metro North RHSO. The Town hired a Housing Coordinator who is a Town employee who provides housing services in accordance with that IMA.

Other Regional Housing Providers

In Franklin County, the Franklin County Housing and Redevelopment Authority (HRA), authorized by the legislature in 1973, has all the powers and authority of a local housing authority and redevelopment authority for all 26 communities in Franklin County. They provide an array of housing and community development services to local governments, although not the types of services outlined in Table 1 above. For example, Franklin County HRA administers Community Development Block Grants (CDBG), manages affordable rental housing across the County, administers housing vouchers and provides housing related consumer education, counseling and referrals to residents. They serve as a "first point of contact" for inquiries related to affordable housing. Their affiliated development entity, Rural Development Inc. (RDI) develops affordable housing.



Resources

<https://www.mass.gov/lists/housing-choice-resources>

- Agreement between Acton, Bedford, Burlington, Concord, Lexington, Sudbury and Weston, 2017
- Inter Municipal Agreement between Hudson, Hudson Municipal Affordable Housing Trust, Bolton, Boxborough, Littleton, Stow and Devens Enterprise Commission, 2017
- Agreement between North Reading, Reading, Saugus, and Wilmington, 2018
- Franklin County Housing and Redevelopment Authority, Annual Report October 1, 2017 to September 30, 2018
- 6-Town Regional Shared housing Services Office, Metropolitan Area Planning Council, 2011

REGIONAL HOUSING SERVICES OFFICE, ESTABLISHED 2021

Member Towns receive housing services for an annual fee per Intra-Municipal Agreement:

- Monitoring
- Inventory Management
- Program Administration
- Assessment Valuations
- Local Support, Website
- Regional Collaboration

Town of Concord Lead Community

MSO Personnel deliver services through Lead Community

Membership Fee covers all staffing and administrative expenses, such as accounting, office support, rent, technology, etc.

	Housing Units	Restricted Units	Restricted Ownership	Share
Acton	8,075	532	53	6.51%
Bedford	5,323	974	52	11.30%
Burlington	3,827	3000	39	20.47%
Concord	6,852	711	89	10.48%
Lexington	11,948	1537	33	11.18%
Sudbury	5,821	357	36	6.03%
Weston	3,952	649	27	3.77%
	57,005	5,095	318	9.78%