



Community Housing Specialist Scope of Services

Supporting the Towns of
West Boylston, Boylston, and Sterling

Through the Three Town Housing Working Group

Community Housing Specialist

Background

The towns of West Boylston, Boylston and Sterling jointly seek the services of a Community Housing Specialist to provide housing support to the communities, with a focus on developing strategies to more confidently and effectively manage affordable housing details for the municipalities.

The collaboration of these three communities took shape through efforts led by the Central Massachusetts Regional Planning Commission (CMRPC) starting in May 2010 with initial findings documented in a report (Housing Planning and Development, December 15, 2010) funded through the Legislature's District Local Technical Assistance program.

In this report, while individual actions identified for each municipality were identified, there were two joint strategies highlighted as key collaborative initiatives. First, the creation of a Three Town Housing Work Group is articulated with goals to develop a shared understanding of each community's housing environment, to foster greater capacity, and to create a set of specific and consistent tools to guide housing efforts – whether publicly sponsored projects, or private developments. The Three Town Housing Work Group is a team comprised of members and housing stakeholders from each community to explore and research opportunities for greater town participation, and to provide direction and oversight to this new effort.

The second most important recommendation noted in the report, is to seek shared professional capacity in the form of a Community Housing Specialist. The specialist would support the Three Town Housing Work Group, and to act as a central point of contact for the town staff, Boards, Committees, developers, residents and other principals for housing activities.

In February 2011, the towns were jointly awarded a Peer-to-Peer grant from the Department of Housing and Community Development (DHCD) to more fully develop this shared capacity of the Community Housing Specialist in a collaborative, regional approach. This scope of services is the final report from the DHCD grant.

Introduction

The towns of West Boylston, Boylston and Sterling recognize that municipalities play a central role in affordable housing from initial proposal through on-going monitoring, irrespective of whether the housing is sponsored by a private developer using 40B or a public or non-profit organization. In the municipal role there are many details and aspects to manage in order to derive maximum community benefit. Focusing attention on the housing activities is not an advocacy action; it is a proactive defensive approach for the towns to attend to the complex details of affordable housing. By providing dedicated and knowledgeable expertise, the towns benefit by increasing local control in housing developments. This local control takes many forms – it articulates local requirements in private 40B projects, it monitors and enforces compliance to conditions and requirements, it develops shared models and best practices among the communities, such as review criteria, standards and guidelines.

These three towns recognize the innovative and effective approach to acquiring these services through a regional shared model. The Community Housing Specialist is not a generalist position, but rather has

experience and focus on affordable housing activities. Sharing this expense across the towns through a contracted scope of services is not only cost efficient, but allows a greater level of expertise to be procured with no additional headcount or impact of Town human resources.

Scope of Services

The Community Housing Specialist is responsible for the coordination, administration and reporting of affordable housing programs and activities supporting the towns of Boylston, Sterling and West Boylston.

It is proposed that the specialist be contracted for a set of core services, as described below, and be available for supplemental services, which would be separately contracted, with separate scope of services defined per project.

Core Responsibilities

The core responsibilities focus on base services that the Community Housing Specialist will perform for the three towns to create a framework to evaluate and approve projects, and to monitor existing units of affordable housing.

Create framework – With dedicated expertise available, develop standards and guidelines; recommend policy and process

- Create and communicate local housing guidelines for local adoption;
- Assist in completion of Commonwealth Capital Application and other municipal surveys and information;
- Provide on-going support to each Town and the Three Town Housing Working Group with attendance at meetings (12 per year), adhoc phone support, and discussions on initial project concepts;
- Provide general expertise to local stakeholders, including ZBA; and the general public on process, opportunities, requirements through education, training, and presentations;
- Provide information for local residents: create interest list, provide contact point, perform outreach for new housing opportunities.

Estimate: 240 hours annually: 120 West Boylston, 60 Boylston, 60 Sterling

Monitor existing projects and units – Ensure and enforce compliance, preserve units

- Create central repository of project legal documents for all projects;
- Review projects with respect to Regulatory Agreement requirements;
- Identify compliance violations and propose course of action;
- Ensure projects are in compliance with applicable limited dividend requirements through Cost Certification review;
- Review and monitor each Town's Subsidized Housing Inventory;
- Assist in locating eligible buyer on resale of affordable housing units.

Estimate (based on SHI units): 160 hours annually: 100 hours West Boylston (189 units), 10 hours Boylston (24 units), 50 hours Sterling (163 units)

Supplemental Services:

The supplemental services provide value-added responsibilities focusing on assisting specific projects and locally sponsored unit creation development and administration. These services will be estimated and contracted on an as-needed basis by each town, with specific defined scope of services, and generally contracted at the same rate as the core services. Suggested and anticipated services include:

Assist with specific proposed projects - Central contact point for pre-permitting activities for new projects

- Assist town boards and developers during the pre-application process, facilitating site and conceptual plan review, project concepts and designs, obtaining community input and comment
- Analyze projects using locally adopted rules, State guidelines and regulation, best practices;
- Recommend mitigation from Town perspective;
- Review finalized plans with regard to the affordable component, including unit mix, disbursement, cost, governance, schedule, marketing;
- Provide technical support during the application and 40B review process, interacting with DHCD and Subsidizing Agency;
- Facilitate feedback from Town Boards for Permitting Authority;
- Coordinate Regulatory Agreement, and other local agreements as appropriate.

Develop bylaws to encourage affordable housing within local zoning

- Investigate, assist and develop bylaws, programs, and projects to create affordable housing;
- Prepare project budgets and schedules, sources and uses, identify local commitment and coordinate applications for local, state and federal resources, including housing grants and loans, assistance and public services or other sources.

Develop programs and projects to create affordable housing

- Investigate Town owned land and other reasonably priced parcels
- Develop partnerships with developers to increase the affordable component in developments
- Develop and implement programs, and projects to create affordable housing including issuing RFP, conducting feasibility studies, and administer through on-going operation.

Administer lotteries and qualify eligible applicants

- Develop marketing plans per regulation and guidelines
- Perform outreach and market units
- Qualify applicants
- Administer lotteries, and assist applicants to close.

Qualifications/Skills

Working under the direction of the Three Town Housing Working Group, the Community Housing Specialist has a high degree of expertise in affordable housing development, the ability to work independently, and is able to manage complex projects.

- Bachelor's degree from a four-year college or university in planning, public administration or related field; plus five years related experience; or equivalent combination of education and experience;
- Strong communication and interpersonal skills, both in dealing with staff, the public and with elected and appointed officials;
- Ability to read, analyze, and interpret financial data, demographics, technical reports and legal documents through excellent computer skills and analytical abilities;
- Ability to coordinate multiple responsibilities and activities, make decisions and problem solve;
- Ability to prepare and deliver written and oral reports and presentations for Boards and Commissions and the public;
- Ability to maintaining confidential and accurate accounts, and manage the procurement process;
- Proficient in grant writing.

Compensation

The three towns anticipate contracting with a consultant for the services described. The consultant is responsible for insurance, equipment and other overhead requirements.

It is anticipated that this CPA-eligible engagement would be priced on an hourly basis, with an estimated 400 hours for the three towns annually, and not to exceed amount of \$20,000 – or \$50 per hour with reimbursed expenses (office and travel). Using the estimates above, this is allocated as follows:

| | Framework | | Monitoring | | Total | |
|---------------|-----------|----------|------------|---------|-------|----------|
| | Hours | Amount | Hours | Amount | Hours | Amount |
| West Boylston | 120 | \$6,000 | 100 | \$5,000 | 220 | \$11,000 |
| Boylston | 60 | \$3,000 | 10 | \$500 | 70 | \$3,500 |
| Sterling | 60 | \$3,000 | 50 | \$2,500 | 110 | \$5,500 |
| Total | 240 | \$12,000 | 160 | \$8,000 | 400 | \$20,000 |

It is anticipated that the towns will issue a Request For Quotation (RFQ) to procure these services.