HousingWorks Infrastructure Program
FY27 Program Information and Guidelines

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Overview

The HousingWorks Infrastructure Program (HWIP) is a program of the Healey-Driscoll Administration and supports its efforts to increase housing production in the Commonwealth. Grant funds may be used for a variety of activities related to horizontal infrastructure projects associated with housing development.

Program Information and these Guidelines have been developed for HWIP applicants. The Executive Office of Housing and Livable Communities (HLC) may issue additional guidance, clarification, or revisions which shall be incorporated by reference into these Guidelines. This document is intended to clarify, interpret, and explain existing program requirements, and to provide guidance on HLC's applicant selection process. It is not intended to be exhaustive.

Maximum Award

There is no set minimum or maximum amount that an eligible applicant may request. Historically, pre-development awards have ranged from $100,000 to $500,000 and construction awards have ranged from about $1M to $5M. Applicants should request funding to support a complete project **or** complete phase(s) and must provide clear justification for the requested amount. Applicants are encouraged to conduct due diligence to determine accurate estimates of project costs to better understand actual costs of the proposed project.

Projects that have secured funding from other government and/or private sources will be more competitive. While a cash match is not required, a match may factor in HLC's applicant selection process. Projects that include at least a 10% local cash match will receive bonus points in application review. To be considered, any match funds must contribute to the direct costs of the infrastructure work. Note that staff time is not considered a "cash match."

HLC reserves the right to make partial awards for amounts less than the original request and to deny an award to applicants with existing or past violations of HLC contractual obligations. Funding availability is subject to the final state budget and capital investment plan.

Project Examples

Examples of eligible projects include, but are not limited to:
1. Improvements to physical infrastructure near a permitted housing project that will support and yield new and/or additional affordable housing units.
2. Engineering designs for water and sewer infrastructure improvements that will increase capacity for new housing production.

3. Physical infrastructure improvements near public transit stations and residential areas to increase safety, mobility, accessibility, increase alternative modes of transportation, and further support housing.
4. Improvements to sidewalks, roads, or other multi-modal infrastructure to increase safety, mobility, and accessibility in the area surrounding housing and adjacent neighborhood(s).
5. Critical upgrades to outdated water, sewer, and other infrastructure to support housing.

Eligible Applicants

All Massachusetts municipalities are eligible for consideration of a FY27 HWIP grant.

Other public entities and private firms, such as but not limited to Redevelopment Authorities, Economic Development Industrial Corporations, Water and Sewer Districts, other bodies created by legislative act to serve a municipality, and home builders, are ineligible to apply as the lead applicant. Ineligible entities must apply in partnership with an eligible applicant.

Housing moratoria or restrictive bylaws:

Municipalities with adopted housing moratoria or other restrictive bylaws that do not allow for at least a 5% increase in housing production over a single year are ineligible. Email McKenzie Bell, Senior Community Grants Coordinator, at mckenzie.bell@mass.gov with questions about this eligibility factor.

MBTA Community Compliance:

Municipalities that are MBTA Communities that HLC determined to be noncompliant under Section 3A of the Zoning Act (MGL c.40A) and corresponding regulations for Multi-Family Zoning Districts (760 CMR 72.00) are ineligible for this grant program.

Use of Funds

Funding is available through the "Infrastructure" category of the Community One Stop for Growth development continuum. Grants will fund a variety of activities related to horizontal infrastructure projects associated with imminent housing development on public or private land. Eligible activities include but are not limited to design, construction, repair, and other improvements to infrastructure to advance projects that support housing development, preservation, or rehabilitation such as but not limited to:
- Sewer lines, septic systems, and other sanitary waste disposal systems, water lines, wells and water treatment systems;
- Utility extensions;

- Streets, roads, curb cuts, and other transit improvements such as crosswalks, traffic calming measures, pedestrian and bicycle ways; and
- Other related horizontal infrastructure work adjacent to planned or imminent housing improvements.

Grant funds shall not be used to support:
1. Any activities related to assertion of the General Land Area Minimum (GLAM) (1.5% of total land area) safe harbor under 760 CMR 56.03(b)(Chapter 40B);
2. Routine administrative tasks of municipal staff including, but not limited to, grant application preparation, procurement, or grant administration;
3. Vertical construction or building and foundation activities;
4. Parking decks or garages; or
5. A development with primary municipal use.

Timeline of Use of Funds

FY27 grants are expected to be awarded in the fall of 2026. As a four-fiscal year grant, FY27 grant funded projects **must be completed by June 30, 2030**.

Community One Stop for Growth Application

The HousingWorks Infrastructure Program is part of the [Community One Stop for Growth](#) (COSG), a single application portal and collaborative review process of community and economic development grant programs that make targeted investments based on a Development Continuum.

The Full Application is organized into the following sections:
- Form 1 – Applicant Information
- Form 2 – Project Information
- Form 3 – Certification of Application Submission Authority

To be considered for funding through the COSG, applicants must include complete responses to all required questions.

Additional COSG Information

- For information on the COSG, including key dates, frequently asked questions, and instructions on submitting an Expression of Interest and Full Application, please visit the [COSG webpage](#).
- The Expression of Interest is an optional, but highly recommended form that allows an applicant to seek guidance from the participating COSG agencies. Applicants are encouraged to submit an Expression of Interest prior to starting their Full

Application(s). Visit the COSG Expression of Interest webpage for more information and access to the Expression of Interest form.

- Full Applications must be submitted electronically through the online application portal IGX. An online webinar outlining the use of the system will be available on the site. Full Application form templates and a link to the application platform will also be available on the COSG webpage.
- Eligible applicants may submit funding requests for more than one project in the same Development Continuum category in the same funding round. However, a separate Full Application is required for each project. Each Full Application will be evaluated independently against the criteria and will be competing directly with all others.
- It is the responsibility of the applicant to be aware of all requirements and deadlines, and to ensure that their Full Application is complete and submitted on time. All Full Applications will be logged as to date and time received and kept on file as public record. Late submissions will not be considered.

Application Review

HLC reserves the right to request additional information from the applicant or external sources as may be necessary to complete the application review. HLC also reserves the right to recommend partial grant awards, as deemed appropriate.

Full Applications will be scored for the responsiveness to the following criteria. At the discretion of EOED and HLC, scoring criteria for infrastructure projects may be shared between MassWorks Infrastructure Program and HWIP to review eligible projects accordingly. Full Evaluation Criteria and Scoring are available in Appendix 1.

- **Project Need:** What community and housing needs are met by the project? Evaluation will consider factors such as impact on housing development, preservation, and/or rehabilitation and other municipally identified and community specific documented needs.
- **Project Readiness:** Is the project scope achievable within the proposed timeline? Evaluation will consider planning to date with factors such as due diligence, stakeholder/public engagement, site readiness, pre-filing meetings with permitting agencies, and design completeness.
- **Project Financial Feasibility:** Is the project's budget reasonable? Evaluation will consider factors such as whether the project is fully or partially funded with grant request, match funding, and reasonableness of cost estimates.
- **Progress & Commitment to Date:** Does the applicant show commitment to the project through past activity and investment? Evaluation will consider factors such as progress to date; prior state/federal funding; and zoning or local by-law changes related to the project.
- **Project Outcomes & Impact:** What are the projected housing outcomes of this project and the impact this project may have on the community? Evaluation will

consider factors such as creating new housing units, addressing identified needs, climate adaptation, impact on future housing development, and alignment with the goals of the HousingWorks Infrastructure Program.

Evaluation will also consider the following factors:
- Past performance with all prior HLC capital grants and capital grant contracts;
- Regional/geographic diversity of awardees;
- Whether an applicant is a first-time HLC capital grants recipient;
- Prior HLC support or investment;
- Successful implementation of a prior HLC capital grant;
- Environmental resiliency; and
- Alignment with Secretariat priorities.

Grant Award Process

Contract with HLC and Award of Funds

Successful applicants must be ready to enter into a contract with HLC within 30 days after receiving contract documents. Funding is subject to the approval of the HLC operating and capital budgets. Grant projects may begin as of the execution of the contract. If selected, an awardee will be required to submit the following forms to complete a contract:
- Commonwealth Standard Contract Form, filled out and signed by the Awardee.
- Commonwealth Scope and Budget Form (available from HLC).
- Completed Contractor Authorized Signature Listing Form (available from HLC).
- Completed Fiscal Exercise Form (available from HLC).

Grant Distribution and Invoicing

Granted funds will be disbursed on a cost reimbursement basis. Only work completed during the period of the executed contract will be eligible for reimbursement. Upon receipt of all required deliverables, the grantee will be reimbursed for the balance of any outstanding grant funds.

APPENDIX 1: HWIP Evaluation Criteria and Scoring

HWIP will evaluate Full Applications through a panel review process per the following criteria for a maximum possible **100 points**.

Overall Project Need (maximum 20 points)

Local Need (project will receive one of the following scores below)
- ➢ **3 points:** Project is a clear result of documented needs <u>specific to the community,</u> and details how community engagement efforts have informed the project, as applicable.
- ➢ **1 point**: Project reasonably describes how it responds to a need related to housing and/or community development but lacks details regarding documented needs <u>specific to the community.</u>
- ➢ **0 points:** Project responds to needs not clearly defined or lacks documented evidence of support.

Housing Nexus (project will receive one of the following scores below)
- ➢ **10 points:** Project directly leverages new housing units.
- ➢ **7 points:** Project supports the preservation or rehab of existing housing units and/or may pave the way for future development of new housing units.
- ➢ **3 points:** Project supports a more livable community, economic development, and/or local transportation options.
- ➢ **1 point:** Project responds to another municipally identified need(s) that is not clearly associated with housing and/or project <u>lacks documented evidence of support.</u>

Priority Need (projects that meet the following criteria will receive points)
- ➢ **BONUS 2 points:** Application is submitted by two or more eligible entities (joint or regional application).
- ➢ **BONUS 2 points:** Project is located <u>within</u> an Environmental Justice census block group.
- ➢ **BONUS 3 points:** Project will advance opportunities for community members who have been socially and economically disadvantaged, and/or historically underrepresented.

Project Implementation (maximum 28 points)

Project Scope (project will receive one of the following scores below)
- ➢ **5 points:** Project scope is clearly defined and reasonably describes a phase or complete project that fits within the grant timeline (6/30/30).
- ➢ **2 points:** Project scope may be feasible within grant timeline (6/30/30) but may face challenges in implementation and/or outlined activities mismatch with stated goals and budget.

➤ **0 points:** Project scope is not clearly defined and/or is not reasonable within grant timeline (6/30/30).

Ability to Execute (project will receive one of the following scores below)

➤ **5 points:** Project leadership is clearly identified and has requisite experience and ability to effectively manage and execute the project.

➤ **2 points:** Project leadership may have experience to manage and execute the project but may face some challenges with capacity and/or unclear leadership structure.

➤ **0 points:** Project leadership is not identified and/or has little to no experience leading a similar project.

Infrastructure Project Readiness (project will receive one of the following scores below)

➤ **5 points:** Project is either A) ready to bid and execute contract within 3 months of award for feasibility, design and/or engineering services by an identified contractor <u>or</u> B) ready to start within 3 months of contracting or in the most immediate construction season for a construction project.

➤ **3 points:** Project may be able to start within 3 to 6 months of award or within two most immediate construction seasons and, if needing procurement, is ready to go out to bid within 3 to 6 months of award.

➤ **0 points:** Project is not ready to commence as steps outside of the scope of this project are needed to be completed prior to start.

Priority Infrastructure Project Readiness (projects that meet the following criteria will receive points)

➤ **BONUS 2 points Cost Estimate:** Project includes a detailed cost estimate that is reasonable and clearly justifies the grant request.

Leveraged Housing Development Readiness (project will receive one of the following scores below)

➤ **5 points:** Project leverages new housing units that will be constructed within 2 years. The associated private development has secured financing and/or has a clear plan to full financing.

➤ **2 points:** Project leverages new housing units that may not be constructed for at least 3 years and/or the associated private development doesn't have a clear or convincing plan of financing.

➤ **0 points:** Project does not leverage new housing units, leverages units that will not be constructed for at least 5 years, and/or associated private development does not have a plan for financing.

Best Practices (projects that meet the following criteria will receive points)

➤ **3 points for Environmental sustainability:** Project reasonably and realistically takes climate change and environmental sustainability into consideration.

➤ **1 point for 40R/Y:** Project site includes 40R Smart Growth District or 40Y Starter Home District.

➤ **1 point for 43D:** Project site includes 43D Expedited Permitting District.

➤ **1 point for DIF/TIF:** Project site includes DIF/TIF incentives.

Project Financial Feasibility (maximum 12 points)

Project Financial Feasibility (project will receive one of the following scores below)
- ➢ **6 points:** Funding request is clearly justified and either A) fully funds the proposed scope (phase or complete project) or B) fills a reasonable funding gap for an otherwise fully funded project. As applicable, funding request unlocks public/private/partner spending match.
- ➢ **4 points:** Funding request includes a draft warrant article or other recommended community funds request to pursue remaining funding with a funding award schedule that allows for project completion by the grant deadline (6/30/30).
- ➢ **2 points:** Funding request is a portion of necessary funds to complete the proposed scope and evidence of other grant applications and potential award schedule is provided.
- ➢ **0 points:** Funding request is an unreasonable amount of funding or more funding than is available to the entire grant.

Priority Financial Feasibility (projects that meet the following criteria will receive points)
- ➢ **BONUS 3 points:** Project includes at least a 10% public funding match (such as DLTA, ARPA, and other municipal/organizational appropriations). Staff time does not count as a match.
- ➢ **BONUS 3 points:** Project includes another 10% cash match funding source. Staff time does not count as a match.

Project Progress & Commitment to Date (maximum 12 points)

Project Progress & Commitment to Date (projects that meet the following criteria will receive points)
- ➢ **4 points:** Project is the result of another previously identified plan or community-based initiative/project that accomplished a previously set community goal.
- ➢ **4 points:** Project has evidence of prior HLC investment/support and/or project will follow up on an ongoing commitment from state/federal agencies and/or grants.
- ➢ **4 points:** Project addresses a long-known need that has not been tackled due to lack of resources.

Project Outcomes & Impact (maximum 28 points)

Outcomes & Impact (project will receive one of the following scores below)
- ➢ **25 points:** Project leverages new housing units, and imminent development includes at least 25% affordable housing units.
- ➢ **22 points:** Project leverages new housing units, and imminent development includes at 10% - 24.9% affordable housing units.
- ➢ **19 points:** Project leverages new housing units, and imminent development includes .01% - 9.9% affordable housing units.

- ➢ **12 points:** Project supports critical infrastructure needs that will preserve and/or rehab existing housing units and/or pave the way for future new units and clearly solves the identified project need.
- ➢ **7 points:** Project may result in or create opportunities for future infrastructure improvements that will advance housing development, preservation, and/or rehabilitation, but may face challenges due to scope, financial feasibility, timeline, etc. Project may improve the quality of life and wellbeing of current residents.
- ➢ **0 points:** Project proposal may not be achievable, or it is unclear that it would result in tangible infrastructure improvements that advance housing development, preservation, and/or rehabilitation.

Priority Outcomes & Impact (projects that meet the following criteria will receive bonus points)

- ➢ **BONUS 1 point:** Project site is located within an MBTA Communities multi-family district which EOHLC has determined to be compliant. Application MUST include the EOHLC letter that affirms district compliance.
- ➢ **BONUS 2 points:** Project site is located within 0.5 miles of a subway, light rail, ferry, bus, or commuter rail station.

APPENDIX 2: Accessing the COSG Full Application

All Full Applications must be submitted electronically through the Community One Stop for Growth application process. The Full Application will be available and accepted through the IGX Platform. A user account is required. Below are the steps for getting into the platform.

An applicant should activate a primary account with the CEO and/or designee(s) as a "Grant Administrator." This person(s) can then add other users, as necessary.

Current Admin Users – Municipal CEOs and/or designees who have used the IGX system in past rounds may use their existing usernames to access the system. Users who have forgotten their username and/or password must use the "Forgot Username/Password" function on the IGX login page.

New Organizations – If an applicant has not accessed the system in the past, a new registration for the organization is required. This should be done by the municipal CEO and/or designee. Click the "New Organization? Register Here" link to submit a registration request. When the account is approved by EOED, the system will send an email notification confirming designation as a Grant Administrator.

> **NOTE**: All new requests for Grant Administrator must be approved by EOED. These will be reviewed as they are received. Applicants will get an email notification from the system confirming the approval. If confirmation is not received after 48 hours, email onestop@mass.gov to request assistance.

New User in Existing Organizations – Once a Grant Administrator is established, that user(s) may then create and/or approve additional user accounts for municipal staff and/or consultants, such as grant writers, engineers, etc. Requests for user access should be made directly to the Grant Administrator.

Creating a new Full Application – Once accounts are registered and/or approved, a Grant Administrator can create a Full Application(s) from the "Start New Document" panel and follow the prompts in the portal. Any designated user may access, edit, and/or save an application on behalf of their organization, and are encouraged to save their work often, particularly after completing each section. Only a Grant Administrator will be able to create and submit the Full Application(s).

Submitting a Full Application – Full Applications may be edited in IGX at any time up until the deadline. Official submissions to the COSG will only be accepted during the posted dates. During these dates, Grant Administrators may submit the Full Application by selecting the "Submit Full Application" option at the bottom of the left side menu. Applicants will receive an email confirming receipt within 24 hours. If an email is not received after 24 hours, email onestop@mass.gov for assistance.

> **NOTE**: If a Full Application is erroneously submitted, email onestop@mass.gov to reopen the Full Application for further editing and completion, as long as it is before the deadline. Staff will try to accommodate these requests as they are received but may not be able to respond to all requests immediately. Once reopened, it is the responsibility of the applicant to resubmit prior to the deadline.

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