
6-Town Regional Shared Housing Services Office

Funding provided by the
District Local Technical Assistance
program

Prepared for the

Towns of Lexington, Bedford,
Concord, Lincoln, Sudbury, and
Weston, Massachusetts

Prepared by

Metropolitan Area
Planning Council
60 Temple Place, 6th Floor
Boston, Massachusetts 02111
Tel (617) 451-2770
www.mapc.org



Acknowledgements

The 6-Town Regional Shared Housing Services program is the culmination of activities that began in 2009. Thank you to all who participated throughout the process. This project was undertaken with funds from the District Local Technical Assistance program. The Metropolitan Area Planning Council wishes to express our thanks to the Governor and the members of the Legislature for their continued support and funding of this program.

This report was produced by the Metropolitan Area Planning Council, professional technical assistance was provided by Jennifer Raitt, Project Manager and Chief Housing Planner; Jennifer Garcia, Legal Counsel; Steve Daly, Director, Municipal Governance; Joseph J. Domelowicz, Jr., Senior Municipal Services Coordinator; Josh Monahan, Municipal Services Coordinator, and Jennifer Erickson, Associate Planner.

Metropolitan Area Planning Council

Officers

President: Michelle Ciccolo, Town of Hudson

Vice President: Lynn Duncan, City of Salem

Secretary: Marilyn Contreas, Department of Housing and Community Development

Treasurer: Taber Keally, Town of Milton

Thank you for the assistance and leadership of the following individuals:

Town of Lexington

Carl Valente, Town Manager

Town of Lincoln

Timothy Higgins, Town Administrator

Town of Bedford

Richard Reed, Town Manager

Town of Sudbury

Maureen Valente, Town Manager

Town of Concord

Christopher Whalen, Town Manager

Town of Weston

Donna VanderClock, Town Manager

Zoe Puice, Bedford; Lisa Mustapich, Bedford; Ellis Kriesberg, Bedford; Jessica Porter, Bedford; Christina Wilgren, Bedford; Linda Prosnitz, Bedford; Lara Kritzer, Concord; Elisabeth Elden, Concord; Don Lashley, Concord; David Hale, Concord; Marcia Rasmussen, Concord; Maryann McCall-Taylor, Lexington; Chris Kluchman, Lexington; Aaron Henry, Lexington; Bill Hoyt, Lexington; Pamela Gallup, Lincoln; Chris Reilly, Lincoln; Renel Fredriksen, Lincoln; Connie Lewis, Lincoln; Peter Von Mertens, Lincoln; Jody Kablack, Sudbury; Dan Gaulin, Sudbury; Noreen Stockman, Weston; Joe Laydon, Weston.

Elsa Campbell, MA Department of Housing and Community Development (DHCD); Jean Daly DHCD; Phil DeMartino, DHCD; Deborah Goddard, DHCD; Margaux Leclair, DHCD; Susan Lynch, MassHousing; Robert Smith, MassHousing; Greg Watson, MassHousing. Susan Connelly, MHP.

Special thanks to Beth Rust, Community Housing Specialist for the Town of Sudbury who provided extraordinary support, creative insight, and direction throughout the project.

TABLE OF CONTENTS

Acknowledgements

Contents	Page
I. Executive Summary	4-5
II. Community Outreach and Analysis	6-7
III. Financial Modeling	8-12
IV. Establish Regional Housing Services Office	13-34
a. Inter-Municipal Agreement	22-34
V. Regional Housing Services Office activities to date	34-49

Executive Summary

This project builds upon MAPC's 2009 DLTA research for MetroWest communities relating to opportunities for potential models for shared services for affordable housing administration.

In the 2011 DLTA project, MAPC assisted with implementation activities as the Regional Housing Services Office began work on regional housing services administration. During the 2010 DLTA project, MAPC performed a Housing Services Assessment of municipal time and funding expended on affordable housing by the communities of Concord, Lincoln, Bedford, Lexington, Weston, and Sudbury. MAPC worked with Town Managers from these communities to analyze results, identify overlapping services/ issues and develop and gain consensus on services

Concurrent with the Assessment, MAPC researched various models for the communities, including:

- Creation of an Inter-municipal Agreement (IMA)
- Creation of a Shared Services District
- Securing an outside consultant to provide services to the Towns
- Creating a separate, private nonprofit 501 (c)(3)

The results of this research on models and the Assessment showed that, because Sudbury already had on staff a housing specialist with experience assisting most of the other towns with previous housing monitoring and other services as well as capacity to expand these services, the other five Towns would benefit from a relationship with the Town of Sudbury in the following services areas:

- Monitoring;
- Ready Buyer/ Ready Renter List;
- Administration of the HOME Program; and
- Affordable Housing Planning and Advocacy.

A financial model was developed from the information provided in the Assessment. Town Managers confirmed their interest in pursuing the IMA fee-for-services model for the above-listed services.

MAPC then drafted an IMA for the five Towns to contract with the Town of Sudbury for services. The Town of Sudbury developed a service model and accompanying suite of services. Local Housing Officials confirmed the model and services at a November meeting. MAPC with the Town of Sudbury made presentations to State Housing Officials. MassHousing and Massachusetts Housing Partnership each provided letters supporting the shared services model.

All towns confirmed a timeline for action and implementation of the Inter-municipal Agreement. MAPC staff accompanied Sudbury officials to a Lexington Board of Selectmen

meeting where the draft IMA was unanimously approved. The Regional Housing Services Office and accompanying Regional Housing Services Fund launched on July 1, 2011.

The ensuing activities included additional implementation planning for each participating community. Additionally, MAPC staff was present for Regional Housing Services Office meetings from August through December 2011. Staff presented the model to the Lieutenant Governor at a special roundtable and then at the statewide Regionalization Conference. Finally, the towns participating in the RHSO and MAPC will be given the Kenneth Pickard Innovation Award at the Annual Massachusetts Municipal Association conference in January 2012.

TASK ONE:

Community Outreach and Analysis

For the first task of this project, the Regional Housing Services needs Assessment, MAPC compiled survey data from Concord, Lincoln, Bedford, Lexington, Sudbury and Weston, analyzed results, identified overlapping services and issues, and determined the long-term commitment of communities participating in the project to develop and gain consensus on services.

MAPC staff initially met with officials in Concord, Lincoln, Bedford, Lexington, Weston, and Sudbury to review existing survey result and determine municipal responsibilities associated with affordable housing, particularly overlapping responsibilities. MAPC worked from the information collected as part of the survey and the MetroWest Regional Affordable Housing Trust research report to create the financial model.

The Summary Sheet of a 24-page detailed municipal time and expenditures on housing analysis is provided on the following page. The analysis provides a summary of the total hours, revenue, and costs expended on municipal housing activities in four core areas: planning, programs, services, and general administration by the Towns of Bedford, Concord, Lexington, Lincoln, Sudbury, and Weston based on data collected with communities May to August of 2010. The additional pages in this workbook provide detail on costs and hours spent by employee on housing activities by community and are available from Jennifer Raitt at jraitt@mapc.org).

[illegible]

TASK TWO: Financial Modeling

For the second task, MAPC developed financial models and a final budget to assist with the formation of a Regional Housing Services Office with the Town of Sudbury, the designated service provider. The final service model and budget are incorporated into Task Three. As the services and accompanying financial model were developed, MAPC sought input from State housing officials to gain their support and Town housing officials to ensure their commitment and participation to the development of a Regional Housing Services Office. The following memo summarizes the December 8 meeting with town officials and housing commission and committee representatives. The subsequent pages contain letters of support that were provided by MassHousing and Massachusetts Housing Partnership respectively.

MEMORANDUM

DATE: December 14, 2010

TO: Richard Reed, Bedford; Chris Whelan, Concord; Carl Valente, Lexington;
Timothy Higgins, Lincoln; Maureen Valente, Sudbury; Donna VanderClock,
Weston

FROM: Jennifer M. Raitt, Chief Housing Planner

RE: Major Points from the Regional Housing Services Office meeting in Bedford

Wednesday, December 8, 2010

Membership Fee Structure:

The membership fees will be deposited into a separate Regional Housing Revolving Fund to be separately tracked and managed. Time will be tracked by task.

Historical data and information from the Housing Services Assessment by MAPC and subsequent interviews were used to create a baseline for the membership fee. Fees would be paid up front, not post-service, because there is a certain amount of investiture needed to make the model work. At nine months the Towns would look at how funds were expended, and make adjustments the following year.

The allocation of hours per community will be adjusted annually. If the number of hours is not correct, the amount will be adjusted accordingly for the second year of participation in the IMA. The staffing model can be expanded and contracted on notice, but the fee for service and participation in the IMA will not change. Membership fees cannot be recaptured by a member community. The termination clause will be strengthened to protect individual communities and the group as a whole.

The IMA is a two-year term. The time tracking process will be used to determine the fee for the following year FY13. If communities wish to terminate, a pro-rated share would be determined and potential pay backs in the event of not full services are not needed.

Action Plans:

An action/ implementation plan would be created for the core services with Beth Rust for each town. The action plan will not include any supplemental services such as resales and lotteries, pre-development activities, a short-term analysis, or work with an assessor's office to provide accurate valuations for affordable housing. There might be other future opportunities for services related to advocacy, identifying funding resources for projects, and other activities.

Advisory Committee:

The town's Advisory Committee representative would be the channel by which any requests or issues would come in. Each IMA member will be responsible for designating Advisory

Committee reps. The Town Managers might consider including alternate community reps in the IMA.

New Communities:

Additional MetroWest or other communities might be able to join in the second year of the IMA. The Town Managers want to see the effort grow so that there would be enough critical mass/ need to sustain the effort. The more critical mass, the less likely individual communities would be left in the lurch. Sudbury also wants to demonstrate their ability to manage the work and desire to grow the effort.

Meeting Attendees:

Zoe Puice, Bedford
Lisa Mustapich, Bedford
Ellis Kriesberg, Bedford
Jessica Porter, Bedford
Rick Reed, Bedford
Christina Wilgren, Bedford
Linda Prosnitz, Bedford
Lara Kritzer, Concord
Elisabeth Elden, Concord
Don Lashley, Concord
David Hale, Concord
Maryann McCall-Taylor, Lexington
Chris Kluchman, Lexington
Carl Valente, Lexington
Bill Hoyt, Lexington
Tim Higgins, Lincoln
Pamela Gallup, Lincoln
Renel Fredriksen, Lincoln
Connie Lewis, Lincoln
Peter Von Mertens, Lincoln
Maureen Valente, Sudbury
Beth Rust, Sudbury
Donna VanderClock, Weston
Noreen Stockman, Weston
Jennifer Raitt, MAPC



Massachusetts Housing Finance Agency
One Beacon Street, Boston, MA 02108

TEL: 617.854.1000 | FAX: 617.854.1091
VP: 866.758.1435 | www.masshousing.com

December 21, 2010

Ms. Jennifer Raitt
Metropolitan Area Planning Council
60 Temple Place
Boston, MA 02111

Re: Proposed Regional Services Office

Dear Jennifer:

As a follow up to your presentation of December 7, 2010 regarding a proposal for shared regional housing services, MassHousing fully supports your efforts to collaborate with the Town of Sudbury and the other participating MetroWest communities in creating a regional housing services office. MassHousing has considerable experience regarding affordable housing developments and programs in various municipal settings and can confirm that many cities and towns would benefit from additional capacity to provide proper local oversight for these projects. This proposal has the potential to address many of the needs that municipalities and developers have raised regarding the need for greater resources devoted to local housing issues.

Please let us know if there is anything that MassHousing can do to further your efforts to encourage more regional collaboration in this area.

Sincerely,

Gina B. Dailey
Director of Comprehensive Permit Programs



**Massachusetts
Housing
Partnership**

December 15, 2010

Ms. Jennifer M. Raitt
Metropolitan Area Planning Council
60 Temple Place
Boston, MA 02111


RE: Proposed Regional Housing Services Office

Dear Jennifer:

As a follow up to our meeting on December 7th I wanted to let you know that I think the proposed Regional Housing Services Office is a great idea. My team at Massachusetts Housing Partnership spends a lot of time working with non-urban communities and consistently we find that it is often not economically feasible for smaller scale municipalities to have the depth of staff to properly support their affordable housing efforts, both pre- and post- development.

I strongly support what MAPC and Beth Rust, of the Town of Sudbury, are trying to accomplish, and hope we can find a way to be helpful with this and other similar efforts in the future.

Sincerely,


Susan Connelly
Director
Community Housing Initiatives

160 Federal Street
Boston, Massachusetts 02110
Tel: 617-330-9955
Fax: 617-330-1919

462 Main Street
Amherst, Massachusetts 01002
Tel: 413-253-7379
Fax: 413-253-3002

www.mhp.net

TASK THREE: Establish Regional Affordable Housing Services Office

For the final task, MAPC worked with the Towns to develop and establish the shared housing services program, this included refining the services offered and further defining the legal and governance aspects of the new entity. This task also included confirming the participation of communities, gaining consensus on leadership structure for program, and addressing legal issues associated with implementation of Regional Affordable Housing Services Office. MAPC began this task by finalizing the Inter-Municipal Agreement with the Towns, primarily working through the Town of Sudbury counsel. MAPC developed a presentation that would be used to discuss the program with Town Boards of Selectmen. The following summary memo and proceeding presentation were shared with Boards of Selectmen.

The final and most important component for task three was the creation of a Draft Inter-Municipal Agreement. The IMA will provide for the Regional Housing Services Office to begin providing services on July 1, 2011. The document received the unanimous support of the Town of Lexington Board of Selectmen on December 20, 2010. Additional Towns are reviewing the document for signature and final approval. A warrant for the creation of a Regional Housing Services Revolving Fund administered by the Town of Sudbury will be drafted during February 2011 and submitted at Sudbury's Spring Town Meeting for final approval.

The following memorandum was used to summarize the project for town Boards of Selectmen.

MEMORANDUM

DATE: November 30, 2010

TO: Richard Reed, Bedford; Chris Whelan, Concord; Carl Valente, Lexington;
Timothy Higgins, Lincoln; Maureen Valente, Sudbury; Donna VanderClock,
Weston

FROM: Jennifer M. Raitt, Chief Housing Planner

RE: Six-Town Municipal Affordable Housing Services - Summary Memo

The following provides an overview and detail of the steps MAPC has taken to explore options for sharing housing administrative services among the Towns of Bedford, Concord, Lexington, Lincoln, Sudbury, and Weston.

The Initial Premise of this initiative began in 2008 and 2009 with the following intention: regionalization of housing activities and services could be a valuable collaborative approach to affordable housing solutions. The early stages of this effort were undertaken by the municipal managers of the HATS communities consisting of Bedford, Concord, Lexington and Lincoln. Independent of this effort, MAPC had been exploring a similar concept for communities in the MetroWest region. After several months of investigation and discussion the HATS group contacted MAPC and learned of the initiative underway in the MetroWest area. The two efforts then converged. By assisting communities with implementing their goals to create permanently affordable homes for individuals and families with low, moderate, and middle incomes, the MetroWest Regional Affordable Housing project could help maintain balanced and diverse housing options.

Phase I of the MAPC initiative involved securing District Local Technical Assistance funding from the Metropolitan Area Planning Council for assistance with research and potential models for shared services for affordable housing administration. The MetroWest Regional Collaborative (then MWGMC) received the DLTA grant through Metropolitan Area Planning Council to research MetroWest housing activities and opportunities to collaborate regionally. Additionally, MWRC researched regional housing trust models and design a model to support MetroWest regional housing activities.

For the first task, staff began working in August 2009 to create and administer a survey to MetroWest communities, including outreach to communities from the Southwest Area Planning Council and Minuteman Advisory Group on Interlocal Coordination (MAGIC) subregions of the Metropolitan Area Planning Council.

Following the research report developed in Phase I, the next phase intended to develop a regional trust and work to launch the program to serve communities in both the MetroWest and MAGIC subregions of MAPC. Staff then presented the Phase I results to the West

Suburban Managers group to gain input and discuss next steps. A smaller group of Town Managers formed to pursue a Phase II pilot project.

For Phase II, MAPC performed a Housing Services Assessment of municipal time and funding expended on affordable housing by the communities of Concord, Lincoln, Bedford, Lexington, Weston, and Sudbury. MAPC worked with Town Managers from these communities to analyze results, identify overlapping services/ issues and develop and gain consensus on services

Concurrent with the Assessment, MAPC researched various models for the communities:

- Creation of an Inter-municipal Agreement (IMA)
- Creation of a Shared Services District
- Securing an outside consultant to provide services to the Towns
- Creating a separate, private nonprofit 501 (c)(3)

The results of this research on models and the Assessment showed that, because Sudbury already had on staff a housing specialist with experience assisting most of the other towns with previous housing monitoring and other services as well as capacity to expand these services, the other five Towns would benefit from a relationship with the Town of Sudbury in the following services areas:

- Monitoring;
- Ready Buyer/ Ready Renter List;
- Administration of the HOME Program; and
- Affordable Housing Planning and Advocacy.

A financial model was developed from the information provided in the Assessment. Town Managers confirmed their interest in pursuing the IMA fee-for-services model for the above-listed services.

MAPC then drafted an IMA for the five Towns to contract with the Town of Sudbury for services. The Town of Sudbury began drafting a more thorough service and delivery model. This service model is still under development and includes refinement to the suite of services and confirmed participation by the communities by making presentations to local Housing Officials and Boards of Selectmen. MAPC with the Town of Sudbury is also making presentations to State Housing Officials

The next steps include confirming a timeline for action and implementation of the Inter-municipal Agreement. The proposed launch date of a regional Housing Services Office and accompanying Regional Housing Service Fund would be on July 1, 2011 or earlier for those communities wishing to begin implementing the program in FY11.

For further questions about next steps or actions by individual communities, please contact me at 617 451 2770 x 2056.

Sincerely,
Jennifer M. Raitt, Chief Housing Planner

Service Model

Member communities receive administrative housing services for annual fee per IMA, including:

- Monitoring
- HOME Program
- Local Support
- Regional efforts
- Resident selection

Bedford



Concord



Lexington



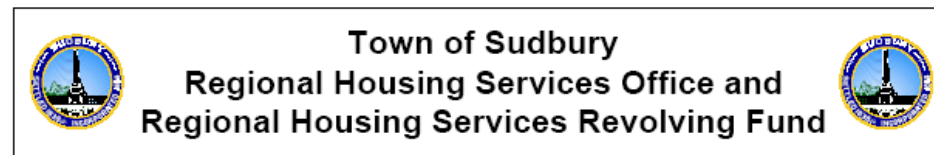
Lincoln



Weston



Town of Sudbury delivers housing services through establishing a Regional Housing Services Office and corresponding revolving fund



**Sudbury
Housing
Staff**

**Additional
Housing Staff/
Contractors**

Regional Benefits

Helping
Municipalities
**Plan,
Permit,
Monitor and
Maintain**
their affordable
housing stock

Regional Housing Model

Proactive Compliance Monitoring

- Preserve Units
- Maintain Housing Inventory

Resource Efficiency

- Access to Regional Renters and Buyers
- Leverage Existing Resources

Regional Approach

- Common Solutions for Common Challenges
- Housing through the Municipal Lens

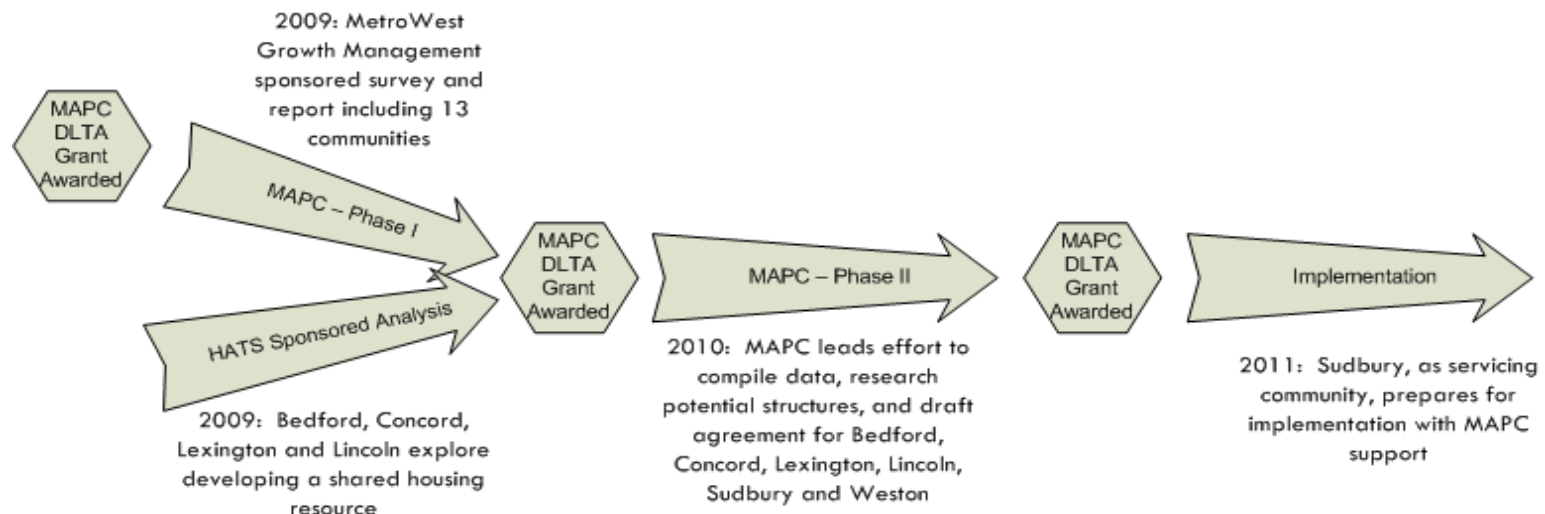
Core Services

- **Monitoring**
 - Monitoring Database
 - Tenant/Owner Compliance (where Town is Monitoring Agent)
 - Project Compliance; working with property owners/other agents
- **HOME administration**
 - Annual Action Plan/CAPER assistance
 - Project Consultation Allowance per Town
- **Local Support**
 - On Site meetings
 - Project Consultation/Review Allowance per Town
- **Regional Activities**
 - Community Linkage
 - Ready-buyer, Ready-renter List
 - Create regional approach
- **Supplemental Services**
 - Separately contracted

Overall Timeline

MAPC recognized that regionalization of housing activities and services is a valuable, collaborative and efficient approach to affordable housing solutions.

- ▣ Awarded **THREE** District Local Technical Assistance grants



Detail Project Plan

ID	Task Name	Start	Finish	% Complete	2010		2011		
					Q3	Q4	Q1	Q2	Q3
1	Regional Housing Service Office	10/1/2010	6/30/2011	35.35%					
2	Create Proposal	11/9/2010	11/15/2010	100%					
3	Present to Town Managers for Commitment	11/9/2010	11/15/2010	100%					
4	Draft Inter-municipal Agreement	10/1/2010	1/20/2011	75%					
5	Present to Towns for Adoption	11/16/2010	1/10/2011	56.67%					
6	State organizations	11/16/2010	12/13/2010	75%					
7	Housing Committees and Boards	11/16/2010	12/13/2010	75%					
8	Board of Selectmen - Vote to proceed	12/14/2010	1/10/2011	20%					
9	Implement Service Model	1/11/2011	6/30/2011	0%					
10	Finalize Interim Agreements and Plan	1/11/2011	2/14/2011	0%					
11	Selectmen Sign IMA	2/15/2011	3/7/2011	0%					
12	Develop Project Plan for each Town	2/15/2011	3/14/2011	0%					
13	Establish RHSO and Put Staff in Place	2/15/2011	5/23/2011	0%					
14	Establish Revolving Fund	5/5/2011	6/1/2011	0%					
15	Establish Advisory Committee	5/24/2011	6/20/2011	0%					
16	Launch	6/21/2011	6/30/2011	0%					

Budget and Staffing

- Staffing is most of the cost
 - ▣ Based on total hours estimated to deliver core services
 - ▣ Includes 28 hours per week amongst:
 - Coordinator, Specialist, Assistant, Technical Expert
- Expenses also include 3As
 - ▣ Audit, Advertising, Administration
- Member Communities fund expenses
 - ▣ Allocation of hours per Town determined using Town's Affordable Housing Stock
- Model is able to scale
 - ▣ Variable and supplemental services

	Hours	Cost	% of Total
Bedford	407	\$24,368	28%
Concord	292	\$17,474	20%
Lexington	389	\$23,289	27%
Lincoln	191	\$11,450	12%
Weston	191	\$11,420	13%
total	1468	\$88,000	100%

INTERMUNICIPAL AGREEMENT

AGREEMENT

THIS AGREEMENT is entered into by and between the Towns of Bedford, Concord, Lexington, Lincoln, Sudbury and Weston, hereafter referred to collectively as the "Municipalities," this 3rd day of March 2011, as follows:

WHEREAS, the Municipalities except Sudbury desire to share the services and costs of a common Regional Housing Services Office; and

WHEREAS, the Town of Sudbury is willing and capable of providing the services of a Regional Housing Services Office; and

WHEREAS, each of the Municipalities has authority to enter into this Agreement pursuant to G.L. c. 40, s 4A;

NOW, THEREFORE, the Municipalities, in mutual consideration of the covenants contained herein, intending to be legally bound, agree under seal as follows:

1. Term. The term of this Agreement shall commence on July 1, 2011 shall expire on June 30, 2013, unless earlier terminated as set forth herein. Any municipality may withdraw from the Agreement as defined below. The Agreement may be renewed for additional two-year terms as voted by each municipality through its respective Board of Selectmen by January 1 of the year of the expiring term.
2. Lead Municipality. During the Term of this Agreement, the Town of Sudbury, acting as the lead municipality, shall operate the Regional Housing Service Office. The Town of Sudbury, through its standard personnel practices, shall employ or contract the adequate staff necessary to provide the housing administrative services described in Exhibit A: Core Housing Services, attached and incorporated herein, to the remaining Municipalities.
3. Duties. During the Term of this Agreement, the Regional Housing Services Office shall perform the housing administrative services as described in Exhibit A: Core Housing Services for an annual allocation of hours as indicated in Exhibit B: Fee Structure, attached and incorporated herein.
4. Fee Structure and Payment. The Town of Sudbury shall annually invoice the Municipalities for the upcoming year by July 1 with payment due in 30 days and the Municipalities shall make annual payment to the Town of Sudbury pursuant to the Fee Structure, attached as Exhibit B: Fee Structure. Payment for supplemental services not included in Exhibit A: Core Housing Services and for additional hours in excess of the allotted hours in Exhibit B: Fee Structure shall be invoiced separately and at the discretion of the Town of Sudbury and the individual municipality. Towns may borrow or lend hours to other Municipalities upon written agreement between the impacted Towns provided that the total number of hours available to the Regional Housing Services Office remains constant.

5. Second Year Adjustments. The annual allocation of hours in Exhibit B: Fee Structure shall be reviewed and adjusted, if necessary, annually, three (3) months prior to end of each year of the Term of this Agreement. The Town of Sudbury shall provide to all Municipalities a record of the actual hours of services provided to each municipality and make any adjustments necessary for the following year of the Term.

6. Indemnification. Notwithstanding the final sentence of G.L. c. 40, s 4A, to the extent allowed by State statute, the Municipalities shall indemnify and hold harmless the Town of Sudbury and each and all of its officials, officers, employees, agents, servants and representatives from and against any claim arising from or in connection with the performance by the Regional Housing Services Office of their duties in or for the Municipalities including, without limitation, any claim of liability, loss, damages, costs and expenses for personal injury or damage to real or personal property by reason of any negligent act or omission by the Regional Housing Services Office while in or performing services for the Municipalities.

7. Termination. (Subsection A) Any Municipality, by a vote of its respective Board of Selectmen, may withdraw from and terminate this Agreement at the end of any year with the provision of at least six months prior written notice to the Town of Sudbury. No such termination shall affect any obligation of indemnification that may have arisen hereunder prior to such termination. Upon such termination, the Town of Sudbury shall prepare full statements of outstanding unpaid financial obligations under this Agreement and present the same to the terminating Municipality for payment within thirty (30) days thereafter. The Town of Sudbury, by a vote of its respective Board of Selectmen, may terminate this Agreement upon the provision of at least two months prior written notice to the participating Municipalities. After termination of this Agreement, the Town of Sudbury shall remain liable to the participating Municipalities for any portion of the payments received not earned. (Subsection B) Any Municipality may withdraw at the end of any fiscal year in which the municipal legislative body has not appropriated funds sufficient to support that municipality's participation in the subsequent fiscal year. In such an event, the municipality shall give as much notice to other subscribers to this Inter-Municipal Agreement as the circumstances allow.

8. Advisory Committee. There shall exist an Advisory Committee comprised of one (1) representative from each municipality, whom shall be appointed by the Town Manager/Administrator of the municipality. The Advisory Committee shall meet on a quarterly basis in July, October, January and April. The Town of Sudbury shall prepare and send to each municipality a quarterly status report prior to the quarterly meeting.

9. Conflict Resolution. The Advisory Committee may hold additional meetings to discuss and resolve any conflicts that may arise including, but not limited to, disagreements regarding the needs of each municipality and changes to the annual allocation of hours as indicated in Exhibit B: Fee Structure. Any recommendations made to the Director of the Regional Housing Services Office must be made by a majority vote. Any unresolved issues shall be decided by the Town Manager of the Town of Sudbury.

10. Additional Communities. At any time after July 1, 2012, the Advisory Committee may meet and, by unanimous vote and approval of the Lead Municipality, amend this

Agreement to admit an additional municipality. The Advisory Committee may admit no more than three (3) additional municipalities and any such additional municipality must be adjacent to at least one municipality participating in this Agreement unless waived by a majority of the Town Manager's of the originally participating communities.

11. Financial Safeguards. The Town of Sudbury shall maintain separate, accurate and comprehensive records of all services performed for each of the Municipalities hereto, and all contributions received from the Municipalities. The Town of Sudbury shall issue a financial report for each fiscal year to each of the Municipalities by December 31 of the following fiscal year.

12. Assignment. None of the Municipalities shall assign or transfer any of its rights or interests in or to this Agreement, or delegate any of its obligations hereunder, without the prior written consent of all of the other Municipalities.

13. Amendment. This Agreement may be amended only by a writing signed by all Municipalities duly authorized thereunto.

14. Severability. If any provision of this Agreement is held by a court of appropriate jurisdiction to be invalid, illegal or unenforceable, or if any such term is so held when applied to any particular circumstance, such invalidity, illegality or unenforceability shall not affect any other provision of this Agreement, or affect the application of such provision to any other circumstances, and the remaining provisions hereof shall not be affected and shall remain in full force and effect.

15. Governing Law. This Agreement shall be governed by, construed, and enforced in accordance with the laws of the Commonwealth of Massachusetts.

16. Headings. The paragraph headings herein are for convenience only, are no part of this Agreement and shall not affect the interpretation of this Agreement.

17. Notices. Any notice permitted or required hereunder to be given or served on any Municipality shall be in writing signed in the name of or on behalf of the Municipality giving or serving the same. Notice shall be deemed to have been received at the time of actual receipt of any hand delivery or three (3) business days after the date of any properly addressed notice sent by mail as set forth below:

Town of Bedford
Richard Reed, Town Manager
10 Mudge Way
Bedford, MA 01730

Town of Concord
Christopher Whelan, Town Manager
Town House, P.O. Box 535
22 Monument Square

Concord, MA 01742

Town of Lexington

Carl F. Valente, Town Manager
1625 Massachusetts Avenue
Lexington, MA 02420

Town of Lincoln

Timothy S. Higgins, Town Administrator
16 Lincoln Road
Lincoln, MA 01773

Town of Sudbury

Maureen G. Valente, Town Manager
278 Old Sudbury Road
Sudbury, MA 01776

Town of Weston

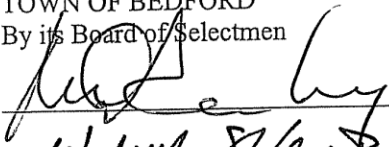
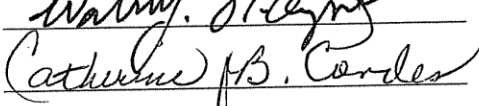
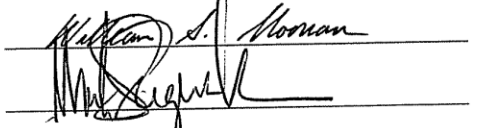

Donna S. VanderClock, Town Manager
P.O. Box 378
Weston, MA 02493

18. Complete Agreement. This Agreement constitutes the entire Agreement between the Municipalities concerning the subject matter hereof, superseding all prior agreements and understandings. There are no other agreements or understandings between the Municipalities concerning the subject matter hereof. Each Municipality acknowledges that it has not relied on any representations by any other Municipality or by anyone acting or purporting to act for another Municipality or for whose actions the any other Municipality is responsible, other than the express, written representations set forth herein.

WITNESS OUR HANDS AND SEALS as of the first date written above.

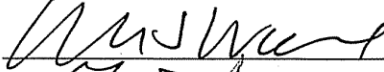
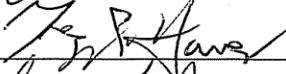



WITNESS OUR HANDS AND SEALS as of the first date written above.

TOWN OF BEDFORD
By its Board of Selectmen


William S. Stoyan

Catherine B. Cordes

William S. Stoyan

William S. Stoyan


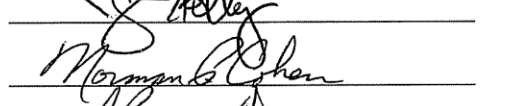
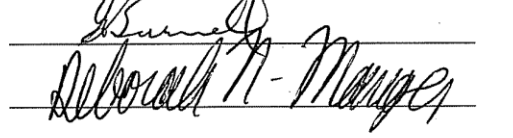
WITNESS OUR HANDS AND SEALS as of the first date written above.

TOWN OF CONCORD
By its Board of Selectmen

WITNESS OUR HANDS AND SEALS as of the first date written above.

TOWN OF LEXINGTON
By its Board of Selectmen

WITNESS OUR HANDS AND SEALS as of the first date written above.

TOWN OF LINCOLN
By its Board of Selectmen

Gary A. Jangle

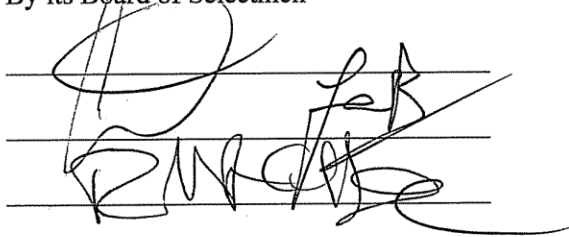
Eric A. Reilly

[Signature]

12/20/11

WITNESS OUR HANDS AND SEALS as of the first date written above.

TOWN OF SUDBURY
By its Board of Selectmen

Three handwritten signatures are written over three horizontal lines. The first signature is a large, stylized 'D' with a vertical line through it. The second signature is a cursive 'R' followed by 'M' and 'C'. The third signature is a cursive 'A' followed by 'S'.

WITNESS OUR HANDS AND SEALS as of the first date written above.

TOWN OF WESTON
By its Board of Selectmen

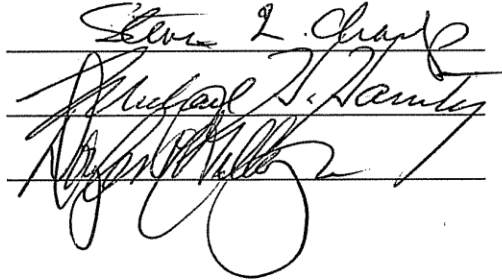


Exhibit A
Core Housing Services

1. Monitoring
 - Monitoring Database of Affordable Housing Developments and residents
 - Annual monitoring of ownership units
 - Annual monitoring of rental developments
2. Subsidized Housing Inventory administration
 - Reconcile municipal inventory records with the Subsidized Housing Inventory maintained by the Department of Housing and Community Development
 - Add new units to the inventory as required
3. HOME administration
 - Assist in the preparation of the Annual Action Plan and Annual CAPER documents
 - Consult on HOME funded projects
 - Prepare proposals for supplemental services as needed
4. Local Support
 - Meet on-site with staff and housing entities
 - Consult on projects
 - Review project documents
 - Prepare proposals for supplemental services as needed
5. Regional Activities
 - Assist communities with regional linkages
 - Create Ready-buyer list
 - Create Ready-renter list

Exhibit B Fee Structure

The participating municipalities will proportionally share the total cost of operating the Regional Housing Services Office. 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.

Membership Fee Schedule			
	Hours	% of hrs	Pro rata \$
Bedford	406.5	28%	\$24,368
Concord	291.5	20%	\$17,474
Lexington	388.5	26%	\$23,289
Lincoln	191	13%	\$11,450
Weston	190.5	13%	\$11,420
total	1468	100%	\$88,000

This fee structure does not include payment for supplemental services which will be proposed and invoiced outside of this agreement or payment for additional hours in excess of the allotted hours.

Regional Affordable Housing Services

Office Activities to date

With the support of the Metropolitan Area Planning Council, the Regional Housing Services Office is providing municipal technical support for the administrative of affordable housing, making efficient use of resources, and is viewed as a creative approach to maintaining the 3,200 units of affordable housing in this service area.

A RHSO Advisory Committee was established via the Inter-Municipal Agreement signed by all participating communities. The Committee has been meeting since August. Copies of their monthly updates, included in this report, provide a review of RHSO activities and lessons learned. The RHSO has been recognized by numerous state housing agencies as an effective model. Additionally, the RHSO was recognized by the Lieutenant Governor as part of the annual regionalization conference as an effective collaboration to ensure affordability is protected for the long-term. The project will be recognized with The Kenneth E. Pickard Municipal Innovation Award at the 33rd Massachusetts Municipal Association's Annual Meeting and Trade Show in January.

The RHSO has gained significant traction in a short time and has gained notice by other municipalities within the MAPC region. The RHSO via the Town of Sudbury with MAPC's assistance submitted a \$250,000 Community Innovation Challenge grant to develop a database application to improve the efficiency of delivering the housing services and to provide a scalable model for similar regional efforts. There are two major modules to be provided:

- **Monitoring Agent database:** Capture data elements on the affordable housing developments in the participating towns, including project level, unit level and resident level. Include the ability to upload the regulatory framework and legal documents for the housing developments in the participating towns.
- **Resident Assistance portal:** Provide the capability for future residents (renters and owners) to indicate their interest in housing opportunities offered in the service area. Offer community linkages to relevant services and programs, including home repair, foreclosure assistance and other resources

The secure database will be available over the web, offered via a new domain – www.rhso.gov and will enhance the shared service offerings of the existing Regional Housing Services Office. MAPC will continue to provide support, expertise, and facilitate implementation of the CIC Grant to learn from the RHSO experience and determine appropriate replication of the initiative in other MAPC municipalities.

The database will cement the best practices for this existing effort. The RHSO has spent the first year of operation gathering the required data to populate the database for the over 3,000 units of affordable housing in the service area. Once developed, the database can be implemented in other regional consortiums to provide a scalable model for other

municipalities. Municipalities throughout the Metropolitan Area Planning Council have expressed an interest in this model, including: Hamilton, Wenham, Bellingham, Acton, Boxborough, Hudson, Littleton, Bolton, Saugus, Lynnfield, Danvers, Peabody, North Reading, Reading, and Wakefield.

The Regional Housing Services Office is providing benefits to both the Towns and their residents. The Towns receive access to dedicated knowledgeable housing resources that are able to support their staff. They are not required to select, hire or contract with an individual for these services, and instead can ‘tap into’ the support they need. The residents – both current and future – also have access to a central office to assist with housing related items. Future residents find value in having a regional office with consolidated opportunities. The continued success of the innovative Regional Housing Services Office requires all the elements that drove implementation: flexibility and commitment, management and competence.

RHSO Updates August to November 2011



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

Section 3: Project Plan, September 20, 2011

ID	Task Name	Start	Finish	Duration	% Complete	Q3 11			Q4 11		
						Jul	Aug	Sep	Oct	Nov	Dec
1	RHSO	7/1/2011	1/13/2012	141d	35.3%						
2	Monitoring	7/1/2011	1/13/2012	141d	44.8%						
3	Ownership	7/1/2011	12/9/2011	116d	65.73%						
4	Define Ownership Monitoring Program	7/1/2011	7/28/2011	20d	100%						
5	Obtain Owner Deeds	7/29/2011	8/22/2011	17d	100%						
6	Obtain Owner Self-Declarations	8/23/2011	10/14/2011	39d	75%						
7	Document Compliance Findings	10/17/2011	11/11/2011	20d	25%						
8	Finalize repository	11/14/2011	12/9/2011	20d	25%						
9	Rental	8/15/2011	1/13/2012	110d	22.73%						
10	Define Rental Monitoring Program	8/15/2011	9/9/2011	20d	75%						
11	Obtain Project Records	9/12/2011	10/7/2011	20d	50%						
12	Obtain Existing Compliance Reports	10/10/2011	11/4/2011	20d	0%						
13	Contact Project Sponsors	11/7/2011	12/2/2011	20d	0%						
14	Document Compliance Findings	12/5/2011	12/16/2011	10d	0%						
15	Finalize Repository	12/19/2011	1/13/2012	20d	0%						
16	SHI Administration	9/19/2011	11/4/2011	35d	22.86%						
17	Receive new SHI from DHCD	9/19/2011	9/30/2011	10d	80%						
18	Resolve Discrepancies with DHCD	10/3/2011	11/4/2011	25d	0%						
19	HOME Administration	8/1/2011	8/19/2011	15d	100%						
20	CAPER Update	8/1/2011	8/19/2011	15d	100%						
21	Local Support	7/1/2011	12/29/2011	130d	33%						
22	Individually for Each Town	7/1/2011	12/29/2011	130d	33%						
23	Regional Activities	7/1/2011	12/28/2011	129d	23.08%						
24	Set up RHSO	7/1/2011	11/17/2011	100d	30%						
25	Produce Status Reports	8/1/2011	12/16/2011	100d	30%						
26	Plan for FY13	11/1/2011	12/26/2011	40d	0%						
27	Start Ready Renter/Ready Buyer	12/1/2011	12/28/2011	20d	0%						



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

November 21, 2011

To: Richard Reed, Chris Whelan, Carl Valente, Timothy Higgins, Donna VanderClock,
Jessica Porter, Marcia Rasmussen, Lara Kritzer, Maryann McCall-Taylor, Aaron Henry, Chris
Reilly, Pamela Gallup, Joseph Laydon

CC: Maureen Valente, Jody Kablack, Jennifer Raitt, Dan Gaulin, Linda Prosnitz, Sally Hild

From: Beth Rust

RE: Regional Housing Services Office – October 2011 Status Report

This is the monthly status report for the Regional Housing Services Office, an inter-municipal collaboration between Bedford, Concord, Lexington, Lincoln and Weston, hosted by Sudbury.

The status report has three sections: a summary of this month's activities for each of the major scope items, a more detailed description with numerical status, and a project plan for the first 6-months of the year. Please let me know if you have suggestions for the report.

Section 1: Summary Update

This is the fourth month of the Regional Housing Services Office, and all activities are well underway. The program continues to gain momentum as implementation gives way to on-going operation.

Overall Program:

The interest in this regional effort continues. The Regional Housing Services Office will be featured in the statewide Regionalization Best Practices project pursued by The Massachusetts Association of Regional Planning Agencies (MARPA), to be rolled out in January.

The Advisory Committee members continue to be the main contact points for the RHSO, and we continue to thank them for their participation and feedback. The quarterly Advisory Committee meeting was held Thursday October 27, 2011. The agenda included an overall status of the program elements, as well as a discussion on next year. Jennifer Raitt reported that the Lieutenant Governor's Office will be administering \$4,000,000 in Community Innovation Challenge Grants designed to incentivize and support innovative regionalization. The grant program was announced on November 7, and the RHSO is considering applying to fund a Monitoring Database to house the information collected, to provide access to member communities, to provide a model for other regional efforts to leverage, and to allow current and potential future residents to indicate interest in housing. The meeting also included a discussion on including new communities next year, with the consensus that the Advisory Committee would recommend adding one additional community, with Wayland and Acton as potential candidates. It was noted that December 31 is the date for communities to indicate intentions to terminate, with the default of continuing, per the IMA.

The January Advisory meeting will be held early, December 14, and attended by the Town Managers as well, for a six-month review of the Program.



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

SHI Administration:

October was an active month for updating the Subsidized Housing Inventory. In September, DHCD issued their biennial update to the Subsidized Housing Inventory using the 2010 Census information, and updates were due to October 14, 2011. Throughout the five communities, 50 units were added to the inventory.

Town	units on SHI 8/31	added by RHSO	units on SHI 11/9	% Subsidized	Comments
Bedford	860	17	877	16.48%	Habitat, 447 Concord Rd
Concord	701	18	719	10.49%	Walden St, Lalli Woods, Elm Court, Elm Brook, 405 Old Bedford Rd
Lexington	1320	12	1332	11.15%	(pending) Lexington Place, Lexington Courtyard
Lincoln	236	0	236	10.96%	
Weston	137	3	140	3.54%	Pine Street, Church Street
<i>total</i>	3254	50	3304		

Local Support:

The local support category enables each municipality to have some amount of hours to support priority items that are not covered under Monitoring, SHI, and HOME. In October, the following activities were performed in this category:

- Bedford – Responded to contacts from residents, held a workshop for the Bedford Housing Partnership meeting for producing the housing element of the Comprehensive Plan, continued bi-weekly status meetings with town staff, completed work with Assessors on valuation of affordable units In summary (identifying \$481,720 of under assessed value, estimated at \$6,903 of property tax income to the Town), started marketing the resale of a unit at Shawsheen Ridge, assisted one particular owner with specialized communication from DHCD.
- Concord – Responded to contacts from residents, finalized the closing documents for the resale of 87 Elm Brook.
- Lexington – Continued bi-weekly status meeting with town staff, attended Lexington Housing Partnership meeting, started discussions on LexHab tenant selection policy.
- Lincoln – Responded to contacts from residents.
- Weston – Responded to contacts from residents, continued discussion with Weston Housing Partnership on its charter, finalized housing list with Council on Aging, started investigation into placing an affordable housing restriction on Brooks School.

We are finding that meeting with the staff and local housing entities is assisting in accomplishing the objectives. It provides an opportunity to review the research completed and to jointly devise solutions and strategies for the specific items.



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

Section 2: Detailed Hours Review

4	Monthly Actual Hrs	Monthly Budget	Monthly Actual v Budget	YTD Actual	YTD Budget	YTD Actual v Budget	Annual Budget	YTD #email, Calls, Letters
Bedford								26
Monitoring	18.8	17.8	0.9	71.2	71.3	-0.2	214	
SHI Administration	5.0	2.3	2.8	11.0	9.0	2.0	27	
HOME administration	0.0	1.0	-1.0	5.0	4.0	1.0	12	
Local Support	26.0	9.3	16.7	62.0	37.3	24.7	112	
Regional Activities	8.1	3.5	4.6	19.3	13.8	5.5	41.5	
<i>Monthly Total</i>	<i>57.8</i>	<i>33.9</i>	<i>23.9</i>	<i>168.5</i>	<i>135.5</i>	<i>33.0</i>	<i>407</i>	
Concord								24
Monitoring	4.0	8.3	-4.3	38.5	33.0	5.5	99	
SHI Administration	5.0	2.3	2.8	5.0	9.0	-4.0	27	
HOME administration	0.0	1.0	-1.0	0.0	4.0	-4.0	12	
Local Support	8.0	9.3	-1.3	41.0	37.3	3.7	112	
Regional Activities	8.1	3.5	4.6	19.1	13.8	5.2	41.5	
<i>Monthly Total</i>	<i>25.1</i>	<i>24.3</i>	<i>0.8</i>	<i>103.5</i>	<i>97.2</i>	<i>6.4</i>	<i>292</i>	
Lexington								22
Monitoring	5.0	14.0	-9.0	54.3	56.0	-1.7	168	
SHI Administration	0.0	2.3	-2.3	5.0	9.0	-4.0	27	
HOME administration	0.0	1.3	-1.3	4.0	5.3	-1.3	16	
Local Support	19.5	11.3	8.2	57.0	45.3	11.7	136	
Regional Activities	8.1	3.5	4.6	19.1	13.8	5.2	41.5	
<i>Monthly Total</i>	<i>32.6</i>	<i>32.4</i>	<i>0.2</i>	<i>139.4</i>	<i>129.5</i>	<i>9.9</i>	<i>389</i>	
Lincoln								34
Monitoring	17.5	11.7	5.8	62.6	46.7	15.9	140	
SHI Administration	0.0	0.4	-0.4	2.0	1.7	0.3	5	
HOME administration	0.0	1.0	-1.0	5.0	4.0	1.0	12	
Local Support	0.0	2.0	-2.0	2.0	8.0	-6.0	24	
Regional Activities	8.1	0.8	7.2	19.1	3.3	15.7	10	
<i>Monthly Total</i>	<i>25.6</i>	<i>15.9</i>	<i>9.6</i>	<i>90.6</i>	<i>63.7</i>	<i>26.9</i>	<i>191</i>	
Weston								25
Monitoring	5.0	6.2	-1.2	34.6	24.7	9.9	74	
SHI Administration	0.0	2.3	-2.3	15.0	9.0	6.0	27	
HOME administration	0.0	0.0	0.0	0.0	0.0	0.0	0	
Local Support	0.0	4.0	-4.0	12.0	16.0	-4.0	48	
Regional Activities	8.1	3.5	4.6	19.1	13.8	5.2	41.5	
<i>Monthly Total</i>	<i>13.1</i>	<i>15.9</i>	<i>-2.8</i>	<i>80.6</i>	<i>63.5</i>	<i>17.1</i>	<i>191</i>	<i>131</i>
	<i>154</i>	<i>122</i>	<i>32</i>	<i>582.6</i>	<i>489.3</i>	<i>93.3</i>	<i>1468</i>	



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

Section 3: Project Plan, October 31, 2011

ID	Task Name	Start	Finish	Duration	% Complete	Q3 11			Q4 11		
						Jul	Aug	Sep	Oct	Nov	Dec
1	RHSO	2/1/2011	3/7/2012	287 d	68.65%						
2	Monitoring	7/1/2011	3/7/2012	179 d	64.1%						
3	Ownership	7/1/2011	1/12/2012	140 d	76.36%						
4	Define Ownership Monitoring Program	7/1/2011	7/28/2011	20 d	100%						
5	Obtain Owner Deeds	7/29/2011	8/22/2011	17 d	100%						
6	Obtain Owner Self-Declarations	8/23/2011	11/1/2011	51 d	90%						
7	Document Compliance Findings	11/2/2011	12/15/2011	32 d	50%						
8	Finalize repository	12/16/2011	1/12/2012	20 d	40%						
9	Rental	8/15/2011	3/7/2012	148 d	52.5%						
10	Define Rental Monitoring Program	8/15/2011	9/30/2011	35 d	100%						
11	Obtain Project Records	10/3/2011	11/30/2011	43 d	90%						
12	Obtain Existing Compliance Reports	12/1/2011	12/28/2011	20 d	20%						
13	Contact Project Sponsors	12/29/2011	1/25/2012	20 d	0%						
14	Document Compliance Findings	1/26/2012	2/8/2012	10 d	0%						
15	Finalize Repository	2/9/2012	3/7/2012	20 d	0%						
16	SHI Administration	9/19/2011	11/4/2011	35 d	100%						
17	Receive new SHI from DHCD	9/19/2011	9/30/2011	10 d	100%						
18	Resolve Discrepancies with DHCD	10/3/2011	11/4/2011	25 d	100%						
19	HOME Administration	8/1/2011	8/19/2011	15 d	100%						
20	CAPER Update	8/1/2011	8/19/2011	15 d	100%						
21	Local Support	7/1/2011	12/29/2011	130 d	66%						
22	Individually for Each Town	7/1/2011	12/29/2011	130 d	66%						
23	Regional Activities	2/1/2011	12/26/2011	235 d	66.92%						
24	Set up RHSO	7/1/2011	11/17/2011	100 d	100%						
25	Produce Status Reports	8/1/2011	12/16/2011	100 d	66%						
26	Plan for FY 13	11/1/2011	12/26/2011	40 d	20%						
27	Start Ready Renter/Ready Buyer	2/1/2011	2/28/2011	20 d	0%						



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

December 13, 2011

To: Richard Reed, Chris Whelan, Carl Valente, Timothy Higgins, Donna VanderClock,
Jessica Porter, Marcia Rasmussen, Lara Kritzer, Maryann McCall-Taylor, Aaron Henry, Chris
Reilly, Pamela Gallup, Joseph Laydon
CC: Maureen Valente, Jody Kablack, Jennifer Raitt, Dan Gaulin, Linda Prosnitz, Sally Hild
From: Beth Rust
RE: Regional Housing Services Office – November 2011 Status Report

This is the monthly status report for the Regional Housing Services Office, an inter-municipal collaboration between Bedford, Concord, Lexington, Lincoln and Weston, hosted by Sudbury.

The status report has three sections: a summary of this month's activities for each of the major scope items, a more detailed description with numerical status, and a project plan for the first 6-months of the year. Please let me know if you have suggestions for the report.

Section 1: Summary Update

Program activities are well underway, and the program continues to gain momentum as implementation gives way to on-going operation.

Overall Program:

The interest in this regional effort continues.

We have previously reported that the Regional Housing Services Office will be featured in the statewide Regionalization Best Practices project pursued by The Massachusetts Association of Regional Planning Agencies (MARPA), to be rolled out in January. We will also be applying for a Community Innovation Challenge Grant to fund a Monitoring Database and Resident Portal to house the information collected, to provide access to member communities, and to allow current and potential future residents to indicate interest in housing. These efforts will provide a model for other regional efforts to leverage, as many communities continue to express interest in replicating this model.

Discussions continue on adding new communities next year, with Wayland and Acton as potential candidates. Wayland does not appear to be ready to proceed and we have received a formal interest letter from Acton. These will be explored in February in more detail, as part of planning next year's budget and staffing. It is noted that December 31 is the date for communities to indicate intentions to terminate, with the default of continuing, per the IMA.

Monitoring:

The monitoring program is the heart of the first year's efforts. With almost 3,000 units of affordable housing across the communities, setting up the monitoring inventory is an extensive task.



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

The program started with the ownership units, and the analysis continues. As the updating table below shows, there are a significant number of potential issues identified in each community. We continue to review and refine this list. There are errors in the restrictions themselves, issues of refinancing without consent (with current liens above and below current values), units with no restrictions at all due to unapproved transfers, and other compliance items. A review meeting with DHCD is scheduled for December to discuss action steps for each type of error and then the details will be discussed further with the Towns, as appropriate, before addressing the issues.

Town	Total Ownership Units	Self Declaration		Monitoring Issues	
		not rec'd	% not rec'd	Potential Issue Identified	% of total
Bedford	33	3	9%	15	45%
Concord	61	6	10%	15	25%
Lexington	13	0	0%	6	46%
Lincoln	59	11	19%	30	51%
Weston	25	4	16%	10	40%
<i>total</i>	191	24	13%	76	40%

We continue to receive inquiries from residents in each town regarding refinancing. This may be due to the extremely low interest rates, as well as greater awareness by the owners of the process.

The rental monitoring program is starting, and all projects have been reviewed and mapped by the applicable Town responsibility. A draft rental monitoring letter is available, and the LIP LAU projects will be the first projects to monitor in January.

HOME Support:

The anticipated activities in the HOME support category include assisting communities to commit and expend their available HOME funds, as well as assisting communities to complete their administrative requirements.

In November, the RHSO assisted Bedford with both the Fair Housing audit of the Consortium and the planning for the annual monitoring of 447 Concord Road.

SHI Administration:

The final tasks for the biennial SHI update from DHCD were completed in November. Throughout the five communities, 50 units were added to the inventory. New units are added as they are created.



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

Local Support:

The local support category enables each municipality to have some amount of hours to support priority items that are not covered under Monitoring, SHI, and HOME. In November, the following activities were performed in this category:

- Bedford – Drafted the housing element of the Comprehensive Plan from a workshop held with the Bedford Housing Partnership, continued bi-weekly status meetings with town staff, located an eligible purchase for 34 Shawsheen Ridge and assisted with the financing for 6 Shawsheen Ridge, prepared justification for Local Preference for Hartwell Farms, and assisted with the resales at Bedford Woods.
- Concord – Responded to contacts from residents including two requests for refinancing, worked with the condominium board on the resale of 87 Elm Brook, assisted the CHDC with their CPA request.
- Lexington – Continued bi-weekly status meeting with town staff, obtained corrected resale price certificates for two units at Lexington Courtyard, and planned for work on the LexHab tenant selection policy.
- Lincoln – Responded to contacts from residents, including three requests for refinancing.
- Weston – Responded to contacts from residents, assisted Weston Housing Trust with some start-up activities, assisted Planning Board with amendments to the special permit at Highland Meadows.

We are finding that meeting with the staff and local housing entities is assisting in accomplishing the objectives. It provides an opportunity to review the research completed and to jointly devise solutions and strategies for the specific items.



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

Section 2: Detailed Hours Review

	Monthly Actual Hrs	Monthly Budget	Monthly Actual v Budget	YTD Actual	YTD Budget	YTD Actual v Budget	Annual Budget	YTD #email, Calls, Letters
Bedford								36
Monitoring -31%	7.0	17.8	-10.8	77.9	89.2	-11.3	214	
SHI Administration	0.0	2.3	-2.3	11.0	11.3	-0.3	27	
HOME administration	8.0	1.0	7.0	12.0	5.0	7.0	12	
Local Support	18.5	9.3	9.2	79.5	46.7	32.8	112	
Regional Activities	2.0	3.8	-1.8	20.7	19.0	1.7	45.5	
Monthly Total	35.5	34.2	1.3	201.1	171.0	30.0	411	
Concord								32
Monitoring -14%	8.5	8.3	0.3	46.5	41.3	5.2	99	
SHI Administration	0.0	2.3	-2.3	5.0	11.3	-6.3	27	
HOME administration	0.0	1.0	-1.0	0.0	5.0	-5.0	12	
Local Support	5.0	9.3	-4.3	46.0	46.7	-0.7	112	
Regional Activities	2.0	3.8	-1.8	20.7	19.0	1.7	45.5	
Monthly Total	15.5	24.6	-9.1	118.2	123.1	-5.0	296	
Lexington								26
Monitoring -24%	6.0	14.0	-8.0	60.0	70.0	-10.0	168	
SHI Administration	0.0	2.3	-2.3	5.0	11.3	-6.3	27	
HOME administration	0.0	1.3	-1.3	4.0	6.7	-2.7	16	
Local Support	14.8	11.3	3.4	72.3	56.7	15.6	136	
Regional Activities	2.0	3.8	-1.8	21.1	19.0	2.1	45.5	
Monthly Total	22.8	32.7	-10.0	162.4	163.5	-1.2	393	
Lincoln								40
Monitoring -20%	18.0	11.7	6.3	80.2	58.3	21.9	140	
SHI Administration	0.0	0.4	-0.4	2.0	2.1	-0.1	5	
HOME administration	0.0	1.0	-1.0	5.0	5.0	0.0	12	
Local Support	7.0	2.0	5.0	9.0	10.0	-1.0	24	
Regional Activities	2.0	1.2	0.8	21.1	5.8	15.3	14	
Monthly Total	27.0	16.3	10.8	117.3	81.3	36.1	195	
Weston								28
Monitoring -11%	3.5	6.2	-2.7	37.9	30.8	7.0	74	
SHI Administration	0.0	2.3	-2.3	15.0	11.3	3.8	27	
HOME administration	0.0	0.0	0.0	0.0	0.0	0.0	0	
Local Support	5.0	4.0	1.0	17.0	20.0	-3.0	48	
Regional Activities	2.0	3.8	-1.8	21.1	19.0	2.1	45.5	
Monthly Total	10.5	16.2	-5.7	91.0	81.0	9.9	195	162
	111	124	-13	689.8	620.0	69.8	1488	



Regional Housing Services Office

Serving Bedford, Concord, Lexington, Lincoln, Sudbury and Weston

Beth Rust, Community Housing Coordinator

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3388

Housing@sudbury.ma.us

Section 3: Project Plan, November 30, 2011

ID	Task Name	Start	Finish	% Complete	Q3 11				Q4 11				Q1 12			Q2 12
					Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr		
1	RHSO	7/1/2011	3/23/2012	67.31%												
2	Monitoring	7/1/2011	3/23/2012	76.88%												
3	Ownership	7/1/2011	3/13/2012	88.09%												
4	Define Ownership Monitoring Program	7/1/2011	7/28/2011	100%												
5	Obtain Owner Deeds	7/29/2011	8/22/2011	100%												
6	Obtain Owner Self-Declarations	8/23/2011	12/30/2011	90%												
7	Document Compliance Findings	1/2/2012	2/14/2012	80%												
8	Finalize repository	2/15/2012	3/13/2012	70%												
9	Rental	8/15/2011	3/23/2012	64.06%												
10	Define Rental Monitoring Program	8/15/2011	9/30/2011	100%												
11	Obtain Project Records	10/3/2011	1/13/2012	90%												
12	Contact Project Sponsors	1/16/2012	2/10/2012	0%												
13	Document Compliance Findings	2/13/2012	2/24/2012	0%												
14	Finalize Repository	2/27/2012	3/23/2012	0%												
15	SHI Administration	9/19/2011	11/4/2011	100%												
16	Receive new SHI from DHCD	9/19/2011	9/30/2011	100%												
17	Resolve Discrepancies with DHCD	10/3/2011	11/4/2011	100%												
18	HOME Administration	8/1/2011	2/1/2012	25%												
19	CAPER Update	8/1/2011	8/19/2011	100%												
20	Annual Action Plan	12/1/2011	2/1/2012	0%												
21	Local Support	7/1/2011	12/29/2011	83%												
22	Individually for Each Town	7/1/2011	12/29/2011	83%												
23	Regional Activities	7/1/2011	3/1/2012	70.84%												
24	Set up RHSO	7/1/2011	11/17/2011	100%												
25	Produce Status Reports	8/1/2011	12/16/2011	83%												
26	Plan for FY 13	11/1/2011	3/1/2012	40%												
27	Start Ready Renter/Ready Buyer	2/1/2012	2/28/2012	0%												

Massachusetts Municipal Association Innovation Award Letter



**MASSACHUSETTS
MUNICIPAL
ASSOCIATION**

ONE WINTHROP SQUARE, BOSTON, MA 02110

617-426-7272 • 800-882-1498 • fax 617-695-1314 • www.mma.org

December 13, 2011

Maureen Valente
Town Manager
278 Old Sudbury Road
Sudbury, MA 01776

Dear Ms. Valente,

Congratulations! I am writing with great pleasure to inform you that the MMA has selected Bedford, Concord, Lexington, Lincoln, Sudbury, and Weston to be a recipient of the Kenneth E. Pickard Municipal Innovation Award. Your submission, Regional Housing Services Office, has demonstrated your dedication, commitment and ability to increase the effectiveness of local government by successfully implementing a unique and creative program.

We will present the innovation awards to the three winning projects at the Municipal Award Reception as part of the MMA's 2012 Annual Meeting and Trade Show at the Hynes Convention Center and Sheraton Boston Hotel. The awards ceremony and champagne reception will be held at 6:00 p.m. in the Independence Ballroom of the Sheraton Boston Hotel on Saturday, January 21, 2012. The other winners of the Innovation Contest, the winners of the Town Report Contest, as well as recipients of the Legislator of the Year Award will also be honored at this reception. Please let us know who will be accepting this award by contacting Megan Devine, at 617-426-7272 x104. In addition, if you are interested in purchasing tickets for the Saturday Night Banquet, tables close to the entertainment can be reserved upon request for all winning communities.

The MMA thanks the individuals who served as judges for the contest. This year's judges were Robin Wilkins, former selectman in Harwich, and Richard Kelliher, the Acting Town Administrator in Belmont, and a Senior Fellow at the Moakley Center for Public Management at Suffolk University.

Again, congratulations! We are proud to honor you for the creativity and insight you have shown in establishing this outstanding program. We look forward to seeing you at the reception.

Best wishes for a happy and healthy holiday season!

Sincerely,

Geoffrey C. Beckwith
Executive Director