

TOWN OF WESTON COMMUNITY PRESERVATION COMMITTEE Project Submission Form – FY13

Submitter:
Donna S. VanderClock, Town Manager

Submission Date:
January 9, 2012

Submitter's address:
Town Hall

Phone #: 781-786-5020
E-mail Address: vanderclock.d@westonmass.org

Purpose: (Check all that apply)

- Acquisition, creation, or preservation of open space (including recreation) or the rehabilitation/restoration of open space (including recreation) if acquired or created with CPA funds _____
- Acquisition, creation, preservation, or support of community housing (low and moderate income housing for individuals and families, including low or moderate income senior housing) or the rehabilitation/restoration of community housing if acquired or created with CPA funds X
- Acquisition, preservation, or rehabilitation/restoration of historic resources _____

Project Name and Brief Description:

Community Housing Staff Support – This request has two elements:

1. Staff for the Weston Housing Partnership - \$4,750 for 2.5 hours per week

Since FY09, the ZBA Staff Assistant has supported the Housing Partnership in its planning efforts, funding for which has been provided by the CPA. The same level of support is requested for FY13 as in FY12.

2. Regional Housing Services Office - \$11,420 (placeholder- budget not yet final)

Weston collaborated with the Towns of Bedford, Concord, Lexington, Lincoln, and Sudbury to form a regional housing services office, effective July 1, 2011. Staff from the Sudbury Housing Trust provide a variety of services related to lottery, monitoring, administration of the subsidized housing inventory, and consultation regarding specific projects. Attached is the November 2011 monthly report to give more detailed information about RHSO activities. In December, we were informed that the Massachusetts Municipal Association has awarded its annual Kenneth E. Pickard Municipal Innovation Award to the six towns for this regional effort.

How This Project Helps to Preserve Weston's Character:

In order to achieve greater diversity of housing in Weston, both affordable and moderate, it is necessary to dedicate staff support in addition to volunteer resources.

Projected Cost:

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources
2013	\$16,170	\$16,170	
2014	\$16,170	\$16,170	
2015	\$16,170	\$16,170	
Total	\$48,510	\$48,510	

For Community Preservation Committee Use:

Received on:

Associated Town Department/Committee:

Reviewed on:

Determination:



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.



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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.



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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.



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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	
<i>Monthly Total</i>	<i>35.5</i>	<i>34.2</i>	<i>1.3</i>	<i>201.1</i>	<i>171.0</i>	<i>30.0</i>	<i>411</i>	
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	
<i>Monthly Total</i>	<i>15.5</i>	<i>24.6</i>	<i>-9.1</i>	<i>118.2</i>	<i>123.1</i>	<i>-5.0</i>	<i>296</i>	
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	
<i>Monthly Total</i>	<i>22.8</i>	<i>32.7</i>	<i>-10.0</i>	<i>162.4</i>	<i>163.5</i>	<i>-1.2</i>	<i>393</i>	
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	
<i>Monthly Total</i>	<i>27.0</i>	<i>16.3</i>	<i>10.8</i>	<i>117.3</i>	<i>81.3</i>	<i>36.1</i>	<i>195</i>	
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	
<i>Monthly Total</i>	<i>10.5</i>	<i>16.2</i>	<i>-5.7</i>	<i>91.0</i>	<i>81.0</i>	<i>9.9</i>	<i>195</i>	<i>162</i>
	<i>111</i>	<i>124</i>	<i>-13</i>	<i>689.8</i>	<i>620.0</i>	<i>69.8</i>	<i>1488</i>	



Regional Housing Services Office

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

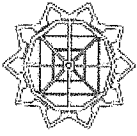
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Section 3: Project Plan, November 30, 2011

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

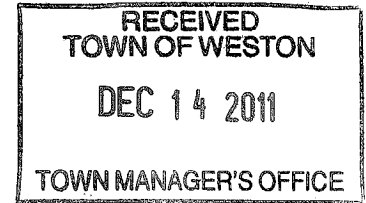


**MASSACHUSETTS
MUNICIPAL
ASSOCIATION**

ONE WINTHROP SQUARE, BOSTON, MA 02110
617-426-7272 • 800-882-1498 • fax 617-695-1314 • www.inma.org

December 13, 2011

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



Dear Ms. VanderClock,

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

DISTRIBUTION

<input checked="" type="checkbox"/>	Selectmen
<input checked="" type="checkbox"/>	Town Manager
<input type="checkbox"/>	Asst. Town Mgr.
<input type="checkbox"/>	DPW
<input type="checkbox"/>	Fire
<input type="checkbox"/>	Police
<input type="checkbox"/>	Consent Agenda
ACTION:	