

SHARED HOUSING SERVICES OFFICE (SHSO)

Three Rivers Interlocal Council (TRIC) Southwest
Advisory Planning Committee (SWAP)

December 7, 2021

SHSOs in Massachusetts

What is an SHSO?

- Towns form partnership to collectively engage housing specialist
- Allows access to specialized expertise without commitment and expense of hiring a housing planner
- Addresses gap in staffing capacity in small towns
- Multi-jurisdictional and collaborative

Existing SHSOs

SHSO	Lead Municipality	Participating Communities
Regional Housing Services Office (2011)	Concord	Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland, Weston
Assabet Regional Housing Consortium (2013)	Hudson	Bolton, Boxborough, Devens Enterprise Commission, Harvard, Hudson, Lancaster, Littleton, Stow
Metro North Regional Housing Services Office (2018)	Reading	North Reading, Reading, Saugus, Wilmington, Woburn

SHSO Functions

Monitor Affordable housing stock on Subsidized Housing Inventory (SHI)

- Compile inventory of deed restricted units and terms
- Annual compliance verification for ownership units and certification for rental units
- Oversee resale of ownership units
- Ensure deed restrictions are maintained and affordability is not lost

SHSO Functions

Other functions may include:

- HOME administration
- Program management
- Project-specific support
- Support to town staff and local committees

Governance

Inter-municipal agreement adopted by member towns' Selectboards defines:

- Scope of services
- Annual fees and process for fee adjustment
- Oversight
- Lead municipality and responsibilities

Lead Municipality

- Contract with services provider
- SHSO revolving fund
 - Receive member town fees
 - Make payments to service provider
- Coordination between service provider and member towns
- Administrative fee included in SHSO budget

TRIC/SWAP SHSO

Background

- Exploratory subregional conversations 2019-2020
- Norwood awarded state Community Compact and MAPC technical assistance funding in 2020

TRIC & SWAP SHSO Discussion

Joint Subregional Meeting

November 17, 2020

What questions do you have about RHSOs?

What makes you interested in an RHSO?

What are your reservations or concerns about an RHSO?

How can this relate to - help or coordinate with Housing Authorities?

What role does the Town play?

Do we have an estimate on the cost per town?

Monitoring of ownership and rental units. Lotteries, marketing of units for sale.

Additional housing staff capacity for towns

Helping prepare Local Action Unit applications to DHCD on behalf of small developers who have to do 1 or 2 affordable units per an inclusionary zoning requirement.

I think we are very interested but not sure we have enough units at this point to justify, especially given covid finances. But as we get more affordable units, I see a great need.

towns who already manage the administrative issues well do not need the shared services; what value do they get?

(continued) I think networking and sharing information is significant value, plus contributing to regional solution...but ?\$

How much does it cost?

Staffing Structure?

Assistance in a small community with guiding SHI unit owners when they want to sell or their options if they are financially having difficulty?

Filling a staffing gap on monitoring affordable housing

Ability to collaborate on larger scale projects we can't handle in house (grant administration is a big one)

We are very interested. I think I finally figured it.

Being able to properly fund the program.

Joining for a term/contract and then leaving the other towns hanging if one town opts out later

Accountability, transparency, and oversight of RHSO. Reporting?

Is there any collective oversight of the RHSO or is it more of a consultant system?

Can you flex based on current needs? some years will be greater than others

Can those Towns that have CPC use a portion of that Housing bucket to fund their allotment towards the RHSO IMA?

Housing is falling through the cracks but we don't have funds for a dedicated staff person to focus on it

Assistance with administrative aspects of having a AH inventory

Preserving expiring units

eliminating redundancy and duplication across towns with respect to people looking for housing and promoting regional collaboration

Where located? or hosted?

One concern I've heard is will a regional staff be "serving two masters" or in other words prioritize some towns over others

Municipal funding is a year to year thing - a town may be in one year, out the next, etc. Could create instability in the RHSO

Long term costs? Hidden costs?

Can they help with the foreclosure process?

RHSO management tends to oversee ownership SHI units, correct? I assume in a rental building the management company would oversee SHI since the affordable unit fluctuates as people's income changes?

Monitor deed-restricted units

Expiring deed restrictions in the next 5 to 10 years from old HOP units

Monitoring Affordable Units

Ability to be flexible in ramping up or down housing staffing based on need. For example, emergency housing program as needed in the pandemic.

How long is the contract?

Concerned about having to make financial commitment before mission is clearly defined - Select Board may not go for it

Convincing Select Board of the value and getting them on board early

Will HPP creation/update be a service offered?

What types of routine reports are provided to the Town?

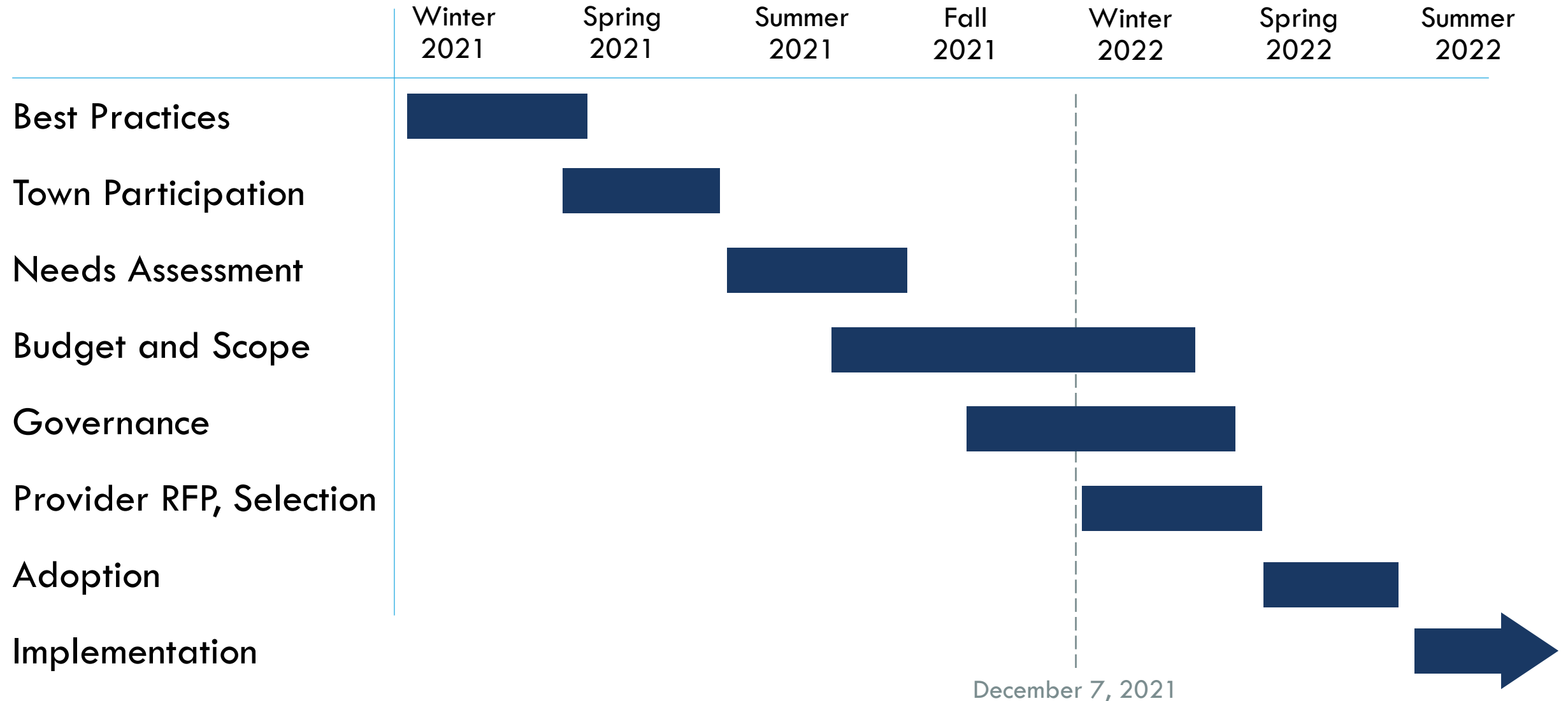
Oversight of SHI

Administering first-time homebuyer programs or rental assistance programs

Cost for participation

Ongoing funding source? Costs

Timeline



Work to Date

- SHSO best practices research
- Town participation
 - **Bellingham**
 - **Hopkinton**
 - **Medfield**
 - **Milton**
 - **Norwood**
 - **Randolph**
 - **Sharon**
 - **Wrentham**
- Needs assessment for participating towns
- Draft budget and scope of services, draft intermunicipal agreement, draft service provider RFP

Needs Assessment July 2021

	Bellingham	Hopkinton	Medfield	Milton	Norwood	Randolph	Sharon	Wrentham
Contact	Jim Kupfer	John Gelcich	Sarah Raposi	Tim Czerwienski	Paul Halkiotis	Michelle Tyler	Fred Turkinton	Rachel Benson
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	508-657-2893	(508) 497-9745	(508) 906-3027	617 898 4847	(781)915-4749	781-961-0936		(508) 384-5441
Interest Level	\$8-\$12	\$15-\$20k	High	\$10-\$15	\$15k	\$10-\$15	\$10-\$15	\$10-\$15
SHI Numerator	801	725	406	477	1229	1294	678	431
SHI Denominator	6341	5087	4220	9641	12441	11980	6413	3821
SHI Percent	12.63%	14.25%	9.62%	4.95%	9.88%	10.80%	10.57%	11.28%
Safe Harbor	Over 10%, HPP certified 9/3/22	Over 10%	HPP Certified to 5/7/22		1.5% of land area	Over 10%	Over 10%, expect to fall below with 2020 Census	Over 10%
Rental	766	665	375	469	1219	1283	676	393
Ownership	35	60	31	8	10	11	1	38
Plans	HPP thru 12/18/24	2017: Master Plan	HPP thru 10/18/21, update planned	HPP thru 2/11/25		2017: Master Plan	HPP thru 6/4/23, Master Plan 2019	Upcoming Master Plan Phase II & III update
Area responsible		Planning Dept, PB	Planning Dept, Trust			Planning Dept	Select Board	
Housing Trust	No	Yes (\$1,354k), not active	Yes (\$34k), active	Yes	No	No	Yes (\$282K), inactive	Future
Other/CDC				HOME				
Use 40B	Yes	Yes	Yes	Yes	0 for 3yrs	Yes	Yes	Yes
Inclusionary Zoning	Yes	Yes, 0 units	Yes, 0 units	No, but inclusionary provisions	Yes	No	Yes, Business District A	No
CPA	No	Yes (2%)	No	Yes (1%)	Yes (1%)	Yes (2%)	Yes	Yes (1%)
Other funding sources			2017:\$1 million bond authorized					
Source SHSO funding	Budget	Trust	Budget	Budget	CPA	CPA	CPA	CPA
SHSO Housing Services								
Professional level expertise	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
LIP Ownership Monitoring	29 Units	38 Units	23 units	8 units	10 units	11 units	1 unit	none
LIP Rental Monitoring	1 Development	1 Development	5 Developments	1 Development	none	1 Development	3 Developments	none
SHI inventory management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Assessment valuations (?)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
# Meetings with staff, Boards	4	4	4	9-12	4-6	4	4	6-12
Project Consultation			2 Projects	2 Projects		2 Projects	2 Projects	
Program Development		1 Program	1 Program		1 Program			
Resident Inquiries			Yes			Yes	Yes	
Specialized Services (year 2+)		Assistance with lotteries, HPP	Inclusionary Bylaw, RFP assistance	HOME Assistance			Create housing units, Grant writing, Managing 40B/LIP Projects, Drafting zoning bylaws, HPP	

Work to Date

Budget and Scope of Services, First Draft August 2021

			Bellingham		Hopkinton		Medfield		Milton		Norwood		Randolph		Sharon		Wrentham	
		SHI	12.63%	801	14.25%	725	9.62%	406	4.97%	479	9.88%	1229	10.80%	1294	10.57%	678	11.28%	431
	Unit Methodology	Hours per unit	#/year	Hours per year	#/year	Hours per year	#/year	Hours per year	#/year	Hours per year	#/year	Hours per year	#/year	Hours per year	#/year	Hours per year	#/year	Hours per year
Monitoring																		
Create Monitoring Database	One per non-PHA+ one per owner (year1)	2	45	90	47	94	31	62	15	30	18	36	27	54	7	14	3	6
Ownership Units: Annual Monitoring	One per LIP unit	1	29	29	38	38	23	23	8	8	10	10	11	11	1	1	0	0
Rental Developments: Compliance report	One per LIP project	3	1	3	1	3	5	15	1	3	0	0	2	6	3	9	0	0
Rental Units: Tenant certification	One per LIP Restricted unit	0.25	63	15.75	60	15	28	7	21	5.25	0	0	34	8.5	102	25.5	0	0
Assessor Valuation	One per ownership unit	0.5	35	17.5	60	30	31	15.5	8	4	10	5	11	5.5	1	0.5	38	19
Local Support																		
Project Consultation	Per Project	10	0	0	0	0	2	20	2	20	0	0	2	20	2	20	0	0
Program Development	Develop Program materials (no admin)	20	0	0	1	20	1	20	0	0	1	20	0	0	0	0	0	0
On Site meetings	Per Meeting: Staff, Board	3	4	12	4	12	18	54	12	36	6	18	4	12	12	36	12	36
Resident Support	Questions, Referrals	1		0		0	12	12		0		0	12	12	12	12		0
	Other	50	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Regional Activities																		
	All participate equally																	
Administration	Financial, Advisory, Status	1	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Regional Activities	Training, workshops, resources	1	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Total	Annual Hours	1231		182		227		244		121		104		144		133		76
	% of total	100%		15%		18%		20%		10%		8%		12%		11%		6%
	hours per week			3.5		4.3		4.7		2.3		2.0		2.8		2.5		1.5
	Cost at \$80/hr	\$80.00		\$14,580		\$18,160		\$19,480		\$9,700		\$8,320		\$11,520		\$10,640		\$6,080

Services

• **Monitoring**

- Monitoring database
- Ownership units annual monitoring
- Rental developments compliance report
- Rental units tenant certification
- Assessor valuation

• **Local Support**

- Project consultation
- Program development
- Board meeting support
- Resident support

• **General**

- SHSO Administration
- Regional trainings/
workshops/
resources

Draft Budget

***FINAL COST WILL BE DEPENDENT ON SERVICE PROVIDER.**

Estimate based on \$80/hour:

Town	Est. Annual Hours	Est. Annual Cost*	Share
Bellingham	182	\$14,580	15%
Hopkinton	227	\$18,160	18%
Medfield	244	\$19,480	20%
Milton	121	\$9,700	10%
Norwood	104	\$8,320	8%
Randolph	144	\$11,520	12%
Sharon	133	\$10,640	11%
Wrentham	76	\$6,080	6%
Total	1231	\$98,480	100%

TRIC/SWAP SHSO

Next Steps

Next Steps: All Towns

- Consensus on intermunicipal agreement
- Submit CPC/Town budget requests
- Preliminary Selectboard approval
- Planning for implementation
- Warrant article for Town budget/CPA, Town Meeting Approval
- Selectboard executes intermunicipal agreement

Next Steps: Lead Municipality

- Sign-off from town leadership
- Review and issue service provider RFP (MAPC to draft)
- Warrant article for revolving fund
- Award service provider contract or re-advertise if needed
- Town meeting approval of revolving fund
- Establish revolving fund