

Application for Community Preservation Funding
Submit to: Community Preservation Committee
Town of Bourne
24 Perry Ave.
Bourne, MA 02532

Housing Services Application FY 2025 (ONLY APPLICATION)

Name of the Applicant: Bourne Housing Partnership

Name of Co-Applicant if Applicable: Bourne Affordable Housing Trust Fund

Contact Name: Susan Ross, Chairperson

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Name of Proposal: Bourne Affordable Housing Services and Support FY 2025

Address of Proposal: Bourne Housing Partnership, Town Hall, 24 Perry Ave., Bourne, MA 02532

Assessor's Map and parcel number: N/A

CPA Category (circle all that apply): Open Space - Historic Preservation - Recreation - {Community Housing} This is the only Application from the Housing Partnership and Housing Trust

CPA Funding Requested: \$99,500 Total Cost of Proposed Project: \$101,500

PROJECT DESCRIPTION:

It is proposed that this program will provide direction, program design and implementation, liaison to governmental, quasi-governmental, and private entities, day-to-day staff support, and consulting services to the Bourne the Bourne Affordable Housing Trust/Partnership to include the Planners Office, and frequently, to the Town in general.

The housing staff over the years has provided professional services in the building, financing, and sale and resale of affordable single-family homes and the implementation of housing rehabilitation programs. Accomplishments include:

- the establishment of the Bourne Affordable Housing Trust Fund;
- creation of the B-HOPP (purchase buy down) program and GAP program;
- creation of a DHCD approved resale ready buyer list which has been widely re-advertised in accordance with DHCD requirements;

- the development and successful completion of a new home construction and sale program;
- the development of a special permit by-law for affordable non-conforming lots;
- served as the catalyst the first successful Community Development Block Grant;
- served as monitoring agent for the resale and marketing of deed restricted units;
- purchase and resale of properties in jeopardy of being lost as affordable;
- the reinstatement of multiple units that had been removed from the State's Subsidized Inventory List;
- the development of the down payment/closing cost program;
- the development of strong working relationships with local, regional, state, and federal agencies;
- Recently worked successfully in cooperation with the Town Planner and Planning Board to receive Town Meeting approval to revise the Affordable Housing requirements in the Buzzards Bay Growth Incentive Zone (GIZ) and the definition of an "affordable unit" in the Town's Zoning Bylaw.;
- Assist and provide administrative support for Lotteries;
- Assist and provide support for Housing Production mandated program;
- Consult; review and provide administrative support to Town Planners Office

Conceptualizing and negotiating an agreement in which the Trust assisted the Town in its efforts to develop a work out strategy for the Pilgrim Pines Development. The four-remaining deed restricted homes in the project have been built and sold to eligible buyers. The development, marketing, and sale of the affordable homes at 143 Old Plymouth Rd. and 31 Wing Rd. in Pocasset have been completed. The Trust purchased the 31 Wing Rd. site and subsidized the sale price with CPA funds and received a special permit from the Planning Board under the non-conforming lot ordinance mentioned above. The Trust has obtained a special permit to construct and sell a single family deed restricted home on Horne Ave in Pocasset.

The part time staff will work on the following key projects:

For the Partnership:

- Continue to monitor the affordable housing inventory and the sale of new affordable homes by private developers and other not for profit developers; market the resale of deed restricted affordable homes including to develop procedures to allow greater coordination with the real estate brokerage community to assist the Town in this process. The staff will continue to provide assistance to those seeking affordable housing options and review, for eligibility, applications for various affordable housing benefits and purchases.
- Work to implement the actions proposed in the updated Housing Needs Assessment and Action Plan.
- Revise existing and/or create new incentives for affordable home purchase programs and create opportunities for affordable rental properties.
- Provide review and recommendations to the Partnership and Town on development projects.
- Maintain and update the "Guide to Housing Programs" publication.
- Review Cape wide efforts to expand the availability of accessory rental dwelling units and recommend changes to local ordinances where such changes would be beneficial.

- Implement the Trust's Down Payment/Closing Costs Program.

For the Housing Trust

- Implement the program to acquire building lots on the open market and through the nonconforming lot by-law and other tools available. The Trust plans to work with a developer to build affordable deed restricted 3 bedroom home on Horne Ave. in Pocasset which was donated to the Trust by the former owners and has received a Special Permit for the project. The Trust, after requesting proposals, is currently on hold with this project until market conditions stabilized.
- Implement the process to build new affordable homes and/or purchase, rehab, and sell existing properties where opportunities exist.
- Continue to provide the Trust and Town with a boilerplate for the documents and procedures utilized on the affordable housing development and sale process
- Seek additional sources of funding for the creation of new affordable homes and affordable rental units.
- Develop new financial resources
- Continue the Trust's role in coordinating the Bourne Critical Needs Affordable Home Repair Program (using CDGB home repair pay back funds) and coordinate with the USDA Housing Rehab Program (the Trust is currently working with approximately 6 home repair requests) (3) of which have been recently completed).
- Work to further the affordable housing goals as they relate to the Downtown Buzzards Bay revitalization efforts including the creation of additional affordable rental units.

1. *Goals:* The goals of the program are to provide the professional and administrative capacity to: preserve and expand the Town's current stock of affordable owner occupied homes and affordable rental housing units; provide Bourne with advice relative to new proposals to build affordable owner occupied and rental housing; build and sell or acquire and resell homes to income eligible households that will be held in perpetuity as affordable and will be added to the State's Subsidized Inventory List in an effort for the Town to meet its 10% goals under the State's 40B requirements; and design, form and implement the planning, regulatory, monitoring, development, and financial tools for the long term creation and preservation of affordable housing in Bourne.

2. *Community Need:* This proposal provides the Town with the ability to further the affordable housing goals of the Comprehensive Plan and the Town's Housing Needs Assessment and Action Plan. The development activities under this project will focus both on single family homes and opportunities to expand affordable rental resources. Research conducted in preparing the Housing Action Plan indicates the significant need for both rental and home ownership units.

3. *Community Support:* The activities proposed within are supported by the Bourne Housing Needs Assessment and Action Plan and The Comprehensive Plan. The Trust was created at Town Meeting with the support of the Bourne Housing Partnership and the Housing Authority for the purpose of carrying out the type of activities proposed within this application. Local support has been demonstrated in many ways over recent years.

The Trust successfully completed the development and sale of affordable homes in a number of Town Villages. Also, when monies were provided in lieu of units at the Keystone assisted living project in Buzzards Bay, those funds were directed by the Town to the Trust for its use in providing affordable housing. This application has been submitted in cooperation with the Housing Partnership, the Housing Trust, and as always, in cooperation with the Housing Authority which has representation on the Partnership. A member of the Board of Selectmen is one of the Trustees of the Trust. This proposal was unanimously approved for submission at the meeting of the Bourne Affordable Housing Trust and the Bourne Housing Partnership on February 10, 2022.

4. *Timeline:* The proposed activities will continue throughout the 2025 Fiscal Year. The process of buying land and building new affordable homes will be a continuous effort.

5. *Credentials:* The Partnership and Trust have access to the skills and knowledge of Town professionals. They have been successfully served by an accomplished part time administrative staff and expect to continue using this part-time formula. The two organizations have memberships that include: a member of the Board of Selectmen who was the past Chairman of the Bourne Housing Authority; 3 Bourne based real estate agents, A dedicated member of the Bourne Waste Water Advisory Committee, Also, another committee member of both the Trust and the Partnership has many years of entrepreneurial success and civic involvement including participation in economic development activities for the city of Worcester. The membership of the Partnership, in addition to the Chairperson, the Executive Director of the Bourne Housing Authority, as well as, a long-time resident with a successful business background. The Town Planner is also a member of the Housing Partnership. The Joint Board Trust/Partnership has approved along with the Planning Department a part-time consultant to replace the retired Program Manager to assist the Planning Department in future endeavors.

The Partnership and Trust believe that its membership and support staff will continue to have strong credentials for the purposes proposed in this application.

6. *Success Factors:* Success would include the continued successful implementation of the wide variety of programs and services outlined above;

7. *Budget:* The following budget is for the estimated cost of the services of the 2 part time Administrative Assistants. One is the Acting Program Manager and one is the Accounting Assistant and other misc. duties, contract professional, technical, marketing, and translation services, legal assistance; and related supplies and operating expenses. Funds to cover the costs for the actual projects implemented, for example, the purchasing land and building houses, are from other funding sources discussed below. In addition, we are currently looking to hire a consultant to help the Planning Department with critical requirements formerly completed by the retired Program Manager with major consulting and reviewing and working with HAC.

CPA funds Requested: \$99,500. Total project cost \$101,500

Part time Staffing services including: 2 Administrative Assistants one of which is an Acting Program Manager who will be leaving. As mentioned in Item 7 – Budget, we are currently looking for a replacement to help with the Planning Department. The other for our bookkeeping and accounting. Duties also include minutes, filing, mailings, research,

marketing, applicant eligibility analysis, grant and proposal writing & management; assist Planning Office where necessary; appraisals; bill processing; bidding; Registry of Deeds; Complete administrative support for Emergency Repair Program; etc

\$60,000

Supplies, equipment, insurance, training, conferences
and travel; mailing costs; printing; computer applications and maintenance; Advertising,
etc.

\$4,000

Outside professional, technical, & legal support, translation marketing services;
\$37,500, consultant to assist Planning Department to replace Program Manager,
HAC Monitoring Contract (\$15,500 + per year); inspections; Administrative
Assistance **and fair share contribution to the cost of Lotteries on at least 3 current
projects (\$18,000+)**, and contingency costs.

Subt \$101,500

The Housing Trust will provide additional overhead.

Subt \$2,000

Total Project Cost	\$101,500
Total CPA	\$99,500

8. *Other funding:* This funding request is for the funds needed to provide for the staff to implement a number of projects, programs, and administrative activities. Plus, Affordable Housing will be turning in approximately \$35,000 from previous year due to 2 lotteries that are in a delayed status and other unused funding in this Administrative Account. Notice above \$18,000 for 3 lotteries anticipated this fiscal year. \$12,000 of the \$18,000 requested was previously approved for fiscal year 24.

In summary, the services provided annually over the past few years have been the catalyst for hundreds of thousands of dollars in construction of new affordable homes, housing repairs, and grant proceeds. This does not include the benefits of the resale of affordable homes to eligible buyers and the successful work to avoid the loss of “affordables” through foreclosure. In addition, Affordable Housing has not had an increase in funding our Administrative Requests for over 3 years while our program have increased dramatically.

9. *Maintenance:* N/A

Additional Information

This application is for the services of needed support staff and administrative costs and not for specific projects. The projects completed by the Partnership and Trust meet the highest level of construction standards required, are typically scattered site, and designed to fit into existing neighborhoods.

Therefore, items 1 through 5 are not applicable at this time.

The questions below are answered in consideration of the above.

Item 6 “appropriate professional standards”. The Partnership, part time, and consultants as needed work ensure that projects and activities meet all applicable codes and standards

7. The Housing Services staff assists the Town in a wide variety of housing related issues such as grant applications, zoning regulations, review of proposed projects, and a central source of housing related information. This is in addition to the variety of functions listed earlier.

8. “Of the evidence of adequate administrative and oversight capability” is covered under item 5 above and, in addition, it is noted that the Town Treasurer has financial authority over Trust funds. All invoices require the approval of the Chairperson, and have previously been submitted through the Town Planner’s office, and paid directly through the Finance Department. It is our understanding that invoices will now be submitted to CPA or the Town Administrator and then to Finance.

9. The Trust has been established by the Town and the Declaration of Trust is available. Each real estate transaction requires that each Trustee must certify a Declaration of Beneficial Interest which is prepared and reviewed by Counsel and submitted to the Commonwealth. The Partnership acts through the Town of Bourne. All financial transactions occur through the Town Finance Department.

Respectfully Submitted,

Susan Ross, Chairperson