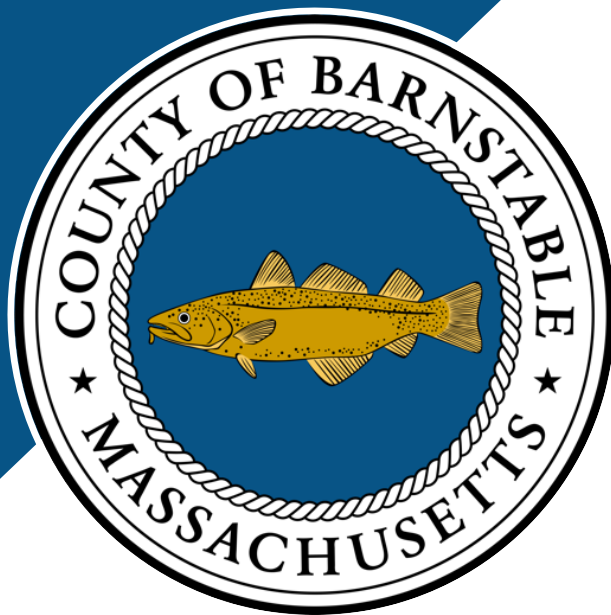


# Barnstable County Shared Regional Housing Services PROGRAM IMPLEMENTATION PLAN



Prepared by Barrett Planning Group LLC for  
Barnstable County Department of Human Services  
October 30, 2023



This project was funded with an appropriation from Barnstable County's American Rescue Plan Act of 2021 (ARPA) funds and established by County Ordinance 23-03.



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## Introduction

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The Barnstable County Department of Human Services has launched a Shared Regional Housing Services (SRHS) Program, established by County Ordinance 23-03 and funded with an appropriation from the County’s American Rescue Plan Act of 2021 (ARPA) funds.<sup>1</sup>

This effort stemmed from input from the Barnstable County HOME Consortium (BCHC) Advisory Council, a decision-making body that determines the allocation of the County’s HOME Investment Partnership Program funds and confers on regional housing issues and strategies.<sup>2</sup> The Advisory Council proposed further exploration toward the creation of a Shared Regional Housing Services (SRHS) program, similar to others that have been created in the state of Massachusetts with shared community funding. The Advisory Council members outlined a need for such a regional housing program, noting that while many Cape communities have a housing coordinator on staff, they nonetheless lack the capacity to manage the array of housing-related tasks necessary for addressing the Cape’s affordable housing crisis.

During researching the technical components of implementing a Shared Regional Housing Services program in Barnstable County, ARPA funds became available to fund the development of such a program. This ARPA-funded pilot SRHS program was designed to provide contracted services across FY2024 and FY2025 (July 1, 2023 through June 30, 2025), during which time County staff could explore a shared Intermunicipal Funding Agreement (IMA) to continue the SRHS program after this two-year period.

After an open RFP process, Barrett Planning Group LLC (BPG) was selected as the successful bidder for this two-year pilot SRHS program, which includes three elements: **Project Initiation and Program Development**, **Regional Support Activities**, and **Community Support Activities**. The Program Overview section of this document details each of these elements.

This document serves as the Program Implementation Plan included in the **Project Initiation and Program Development** deliverables, and consists of the following sections:

- Introduction
- Process Timeline
- Program Overview
- Development of SRHS Inter-Municipal Agreement
- Quarterly Implementation Tracker

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<sup>1</sup> County Ordinance 23-03 allocated \$12.7M in American Rescue Plan Act of 2021 (ARPA) funds across a variety of activities, including \$308,108 for the Human Services Department to fund a Shared Regional Housing Services (SRHS) Program.

<sup>2</sup> The HOME Investment Partnership Program (HOME) is a federally funded grant program provided to state and local governments designed for the creation and preservation of affordable housing for low-income households. The Barnstable County HOME Program provides grant funds for the development and preservation of affordable rental housing throughout Barnstable County. The Barnstable County HOME Consortium [BCHC] is comprised of the 15 communities on Cape Cod, Massachusetts: Barnstable, Bourne, Brewster, Chatham, Dennis, Eastham, Falmouth, Harwich, Mashpee, Orleans, Provincetown, Sandwich, Truro, Wellfleet, and Yarmouth. The BCHC Advisory Council is comprised of a member from each of the fifteen communities of Barnstable County and two at-large members.



## Program Overview

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The scope for this two-year project includes tasks categorized into three elements:

- I. **Project Initiation and Program Development** (Year One)
- II. **Regional Support Activities** (Years One and Two)
- III. **Community Support Activities** (Year Two)

This section provides a description of each element, including the expected deliverables.

### PROGRAM ELEMENT I

#### Project Initiation and Program Development: Year One

##### OVERVIEW

The first program element (**Project Initiation and Program Development**) establishes the framework for the Shared Regional Housing Services program and is expected to be complete during Year One. This element groups together several one-time implementation tasks that are then maintained and updated throughout Year Two.

##### DELIVERABLES

- **Program Implementation Plan**, which includes a project outline, timeline, and list of goals. This Implementation Plan will help establish and develop the program so it can successfully continue and adapt beyond the ARPA-funded two-year project. Barnstable County staff will approve this Program Implementation Plan within the first three months of the project. (Note: this document is the Program Implementation Plan.)
- **Updated Municipal and Affordable Housing Stakeholders Contact List** within the first six months of the program.
- **Regional Affordable Housing Database** within first year to be used to collect and maintain data of affordable housing developments and units, and subsidized housing inventory throughout the region.
- **Content for Affordable Housing Webpage** within first year. Working with assigned County staff, develop content for a regional affordable housing webpage. Note: webpage will be a part of County's existing website, and therefore will not require a stand-alone site.

In addition, BPG and county staff will confer during monthly check-ins regarding the future delivery of community support activities and the contents of a future Intermunicipal Agreement (IMA) for communities who wish to continue participation in the SRHS program beyond this ARPA-funded project. Suggested community support activities and methods of service delivery for Year Two will also be reviewed bimonthly with the Advisory Council during the Council's regular meeting time.

## PROGRAM ELEMENT II

### Regional Support Activities: Years One & Two

#### OVERVIEW

**Regional Support Activities** are intended to assist all fifteen communities equally through the maintenance of the resources established during Year One (i.e., the Municipal Affordable Housing Stakeholders List and the Regional Affordable Housing Database), in addition to the development of templates for common affordable housing documents.

#### DELIVERABLES

- **Maintenance** of the Municipal and Affordable Housing Stakeholders Contact List and Regional Affordable Housing Database
- **Continued support** for the regional housing webpage
- **Universal templates** for affordable housing documents such as:
  - Deed restrictions
  - Monitoring checklists
  - Affirmative fair housing marking and tenant selection plans
  - Local preference documentation checklist
  - Eligible purchaser certificates

BPG will continue to review suggested community support activities and methods of direct service delivery with the Advisory Council during the Council's regular meeting time. Based on this input, BPG and county staff will finalize the approach for Year Two/Community Support Activities. In addition, BPG and county staff will draft an Intermunicipal Agreement (IMA) for communities who wish to continue their participation in the SRHS program after this ARPA-funded launch has concluded.

## PROGRAM ELEMENT III

### Community Support Activities: Year Two

#### OVERVIEW

**Community Support Activities** will enhance local staff capacity by providing hands-on technical expertise and assistance with an array of affordable housing functions to each community. While the majority of Community Support Activities are intended to be a Year Two activity, the groundwork will be laid during Year One through the first two project elements and adjusted as needed based upon input from each community. These services will vary from town to town as needed, with municipalities selecting the tasks with which they need assistance or requesting help with other housing-related tasks not yet identified.

#### DELIVERABLES

- **Maintenance** of the Municipal and Affordable Housing Stakeholders Contact List and Regional Affordable Housing Database
- **Continued support** for the regional housing webpage
- **Implementation of Community Support** activities in all fifteen communities, including but not limited to:
  - Drafting or reviewing regulatory amendments relating to housing
  - Reviewing municipal Requests for Proposals for affordable housing development and reviewing developer responses for feasibility and compliance
  - Assisting localities in preparation of justification for local preference, affirmative fair housing marketing plans, and local tenant selection plans
  - Collaborating with local housing support agencies and governmental agencies on affordable housing issues
  - Advising on proper procedures for the refinancing or sale of affordable deed-restricted properties
  - Coordinating updates of old deed restrictions to universal deed riders as appropriate and assist in negotiating options to deed restrictions to maintain affordability
  - Pro-actively addressing deed restrictions that are at risk of losing their affordability due to expiration, foreclosure, bankruptcy, or non-legal sale
  - Providing monitoring services for selective local affordable homeownership and rental developments for which municipalities are directly responsible
  - Assisting in the preparation of housing-related reports such as Housing Production Plans and housing elements of Local Comprehensive Plans
  - Organizing, facilitating, or preparing materials for community outreach events relating to housing
  - Interpreting relevant laws and regulations, with input from the local Town Counsel as needed
  - Tracking proposed housing legislation and state and federal grant opportunities, and apprising communities

The above list may evolve with input from communities and County staff. For purposes of Year Two, communities will be able to request assistance with the above tasks on an à la carte basis.

The county will finalize and introduce an Intermunicipal Agreement (IMA) by November 2024 for communities who wish to continue participation in the SRHS program beyond June 2025 when ARPA funding ends.

**PRELIMINARY RESOURCE ALLOCATION  
 FOR COMMUNITY SUPPORT ACTIVITIES**

**Updated January 2024**

For initial planning purposes, the general estimate of each community’s hourly support needs for Year Two were originally calculated based upon the weighted voted system of the Barnstable County Assembly of Delegates. This allocation was used as a starting point. Through input received from the communities, it was decided to allocate a total of 30 hours to each community during Year Two of the pilot program. Each community that has not used a minimum of 40 percent of their hours by January 1, 2025 will be asked to document whether they plan to use their hours by June 30. Unused hours may be reallocated at the County’s discretion. Any future IMA will include a determination of hours dedicated to each community and their proportional cost of the total contract.

<b>Community</b>	<b>Estimated Year Two Hours<sup>3</sup></b>
Barnstable	30
Bourne	30
Brewster	30
Chatham	30
Dennis	30
Eastham	30
Falmouth	30
Harwich	30
Mashpee	30
Orleans	30
Provincetown	30
Sandwich	30
Truro	30
Wellfleet	30
Yarmouth	30
<b>Total Hours</b>	<b>450</b>

<sup>3</sup> During Year Two, communities that have not utilized at least 40 percent of their allocation of hours by January 1 of the fiscal year will be requested to document whether they intend to utilize their hours by June 30. Unused community hours may revert to regional hours, as determined by County staff.



## Development of SRHS Inter-Municipal Agreement

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Following the two-year SRHS contract concluding on June 30, 2025, the initial ARPA-funded appropriation will be exhausted. To sustain the program beyond June 30, 2025, one model for continued membership in the SRHS program would require that interested communities enter into an Inter-municipal Agreement (IMA) and appropriate funds annually for the shared cost of services.<sup>5</sup> This has been the model successfully deployed in other regions within Massachusetts that operate a SRHS program.<sup>6</sup> The allocation amount would be dependent upon the number of participating communities and their anticipated needs, for which the consultant and County staff will seek input throughout the development of this program.

Each community opting into the Program would likely be assessed a base fee providing for a fixed amount of hours, with additional hours within a fiscal year available through a pay-as-you-go approach with a fixed hourly rate. A community's hours may be applied to any eligible activity included in the IMA. Should the SRHS program continue through such an IMA, new communities would be able to opt in during subsequent renewal processes, and existing communities could opt out if they wish.

At minimum, the IMA would need to outline:

- The lead entity<sup>7</sup>
- The length of the agreement
- Fee per community based upon anticipated service hours
- Expected services included in the base fee, as well as any services available for an additional fee

County staff will be developing a draft IMA for community consideration based upon data collected during this two-year period of program development. The Department of Human Services has established a **November 2024 deadline** for communities to determine whether they wish to continue their SRHS program participation after June 30, 2025. This deadline was established in consideration of the timeframe for setting annual municipal budgets, the expiration of the existing contract with BPG, and the requirements of procuring a successor contract. Any town choosing not to participate after June 30, 2025 will have incurred no cost related to the work of this pilot program.

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<sup>5</sup> Note: communities that have adopted the Community Preservation Act can appropriate CPA funds for this purpose.

<sup>6</sup> Other SRHS Programs supported through IMAs: Regional Housing Services Office – Concord, Assabet Regional Housing Consortium, and Metro North Regional Housing Services Office.

<sup>7</sup> Currently, the Department of Human Services functions as the Lead entity for the Program. Should the Department continue as the Program Lead, the County could apply its standard 10 percent de minimis or seek some other form of compensation. Alternatively, any of the communities wishing to opt in would be eligible for this designation.

## Quarterly Implementation Tracker

The “Element” listed (I, II, III) indicates whether the task corresponds to Element I – Project Initiation & Program Development; Element II – Regional Support Tasks; or Element III – Community Support Tasks.

### PROGRAM YEAR ONE, FIRST QUARTER

July-September 2023

#### GOALS

- Finalize Program Implementation Plan
- Establish framework for regional affordable housing database
- Determine feasibility of linking to deed restrictions within the regional affordable housing database

#### TIMELINE

##### Meetings & Project Updates

Item	07. 2023	08.2023	09.2023
County Staff Check-In			
HOME Advisory Council Check-In			
Quarterly Report, Y1Q1			

##### Deliverables & Tasks

Project Element & Item	07. 2023	08.2023	09.2023
I. Municipal & Affordable Housing Stakeholders Contact List - Draft			
I. Program Implementation Plan - Draft			
I. Program Implementation Plan - Final			
I. Regional Affordable Housing Database – Draft Framework			
III. Development of System for Delivery of Community Support Activities			

**PROGRAM YEAR ONE, SECOND QUARTER**

October-December 2023

**GOALS**

- Submit first public update on SRHS program for inclusion in Human Services Newsletter and the project website
- Introduce Program Implementation Plan to Advisory Council and solicit input on delivery of services for Year Two (and beyond)
- Finalize structure for Regional Affordable Housing Database
- Finalize Municipal & Affordable Housing Stakeholders Contact List and begin maintenance
- Begin populating database by subregion with assistance from municipal staff, property managers, developers, monitoring agents, etc.

**TIMELINE**

**Meetings**

Item	10.2023	11.2023	12.2023
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y1Q2			

**Deliverables & Tasks**

Project Element & Item	10.2023	11.2023	12.2023
I. Regional Affordable Housing Database – Final Structure			
I. Municipal & Affordable Housing Stakeholders Contact List - Final			
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
I. Regional Affordable Housing Database: Upper Cape			
I. Regional Affordable Housing Database: Mid Cape			
I. Regional Affordable Housing Database: Lower Cape			
III. Development of System for Delivery of Community Support Activities			

## PROGRAM YEAR ONE, THIRD QUARTER

January-March 2024

### GOALS

- Finalize Regional Affordable Housing Database and begin maintenance
- Draft housing document templates and submit to county for review and comment
- Continue to solicit input from Advisory Council regarding ideal framework for service delivery during Year Two (and beyond)

### TIMELINE

#### Meetings

Item	01.2024	02.2024	03.2024
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y1Q3			

#### Deliverables & Tasks

Project Element & Item	01.2024	02.2024	03.2024
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
I. Regional Affordable Housing Database: Lower Cape			
I. Regional Affordable Housing Database: Outer Cape			
I. Regional Affordable Housing Database: Final			
II. Deed Restriction Template - Draft			
II. Monitoring Checklist Template - Draft			
II. Local Preference Documentation Template - Draft			
II. Eligible Purchaser Certificate Template - Draft			
II. Affirmative Fair Housing Marketing & Tenant Selection Plan Template - Draft			
II. County Legal Approval of Draft Templates			
III. Development of System for Delivery of Community Support Activities			

## PROGRAM YEAR ONE, FOURTH QUARTER

April-June 2024

### GOALS

- Finalize housing document templates and submit to county for review and approval
- Finalize plan for service delivery during Year Two and present procedure for accessing services to communities
- Begin to develop an Intermunicipal Agreement (IMA) that incorporates feedback from Advisory Council on service delivery needs

### TIMELINE

#### Meetings

Item	04.2024	05.2024	06.2024
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y1Q4			

#### Deliverables & Tasks

Project Element & Item	04.2024	05.2024	06.2024
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
II. Regional Affordable Housing Database - Maintenance			
II. County Legal Approval of Draft Templates, Continued			
II. Deed Restriction Template - Final			
II. Monitoring Checklist Template - Final			
II. Local Preference Documentation Template - Final			
II. Eligible Purchaser Certificate Template - Final			
II. Affirmative Fair Housing Marketing & Tenant Selection Plan Template - Final			
II. County Legal Approval of All Final Templates			
III. Development of System for Delivery of Community Support Activities			
III. SRHS Community Support Activities: Present to Communities			
III. Development of Inter-Municipal Agreement for SRHS Membership			

## PROGRAM YEAR TWO, FIRST QUARTER

July-September 2024

### GOALS

- Begin service delivery and confer with Advisory Council and county staff on possible adjustments for Year Two and beyond, as well as any necessary updates to the IMA based on this feedback
- Finalize the IMA for continued community participation in the SRHS program beyond Year Two

### TIMELINE

#### Meetings

Item	07.2024	08.2024	09.2024
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y2Q1			

#### Deliverables & Tasks

Project Element & Item	07.2024	08.2024	09.2024
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
II. Regional Affordable Housing Database - Maintenance			
III. Community Support Activities			
III. Development of Inter-Municipal Agreement for SRHS Membership			
III. Inter-Municipal Agreement Finalized			

**PROGRAM YEAR TWO, SECOND QUARTER**

October-December 2024

**GOALS**

- Continue service delivery and confer with Advisory Council and county staff on possible adjustments for rest of Year Two and beyond
- Seek commitment for communities who wish to participate in a future IMA by November 2024
- Determine final fee schedule based on interest and present IMA to interested communities so they can budget accordingly for their Spring 2025 ATM

**TIMELINE**

**Meetings**

Item	10.2024	11.2024	12.2024
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y2Q2			

**Deliverables & Tasks**

Project Element & Item	10.2024	11.2024	12.2024
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
II. Regional Affordable Housing Database - Maintenance			
III. Community Support Activities			

**PROGRAM YEAR TWO, THIRD QUARTER**

January-March 2025

**GOALS**

- Continue service delivery and confer with Advisory Council and county staff on possible adjustments for rest of Year Two and beyond
- Finalize IMA in preparation for member communities’ Spring 2025 Annual Town Meetings<sup>8</sup>

**TIMELINE**

**Meetings**

Item	01.2025	02.2025	03.2025
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y2Q3			

**Deliverables & Tasks**

Project Element & Item	01.2025	02.2025	03.2025
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
II. Regional Affordable Housing Database - Maintenance			
III. Community Support Activities			

<sup>8</sup> The funding for participating communities would be included in their local Annual Town Meeting warrants and subject to the approval of Town Meeting voters.



## PROGRAM YEAR TWO, FOURTH QUARTER

April-June 2025

### GOALS

- Continue service delivery and confer with Advisory Council and county staff on possible adjustments for beyond Year Two
- If necessary, finalize IMA in preparation for and in response to participating communities’ Spring 2025 Annual Town Meetings<sup>9</sup>
- If applicable, assist with transition of SRHS program to consultant or staff who will lead the program beginning July 2025

### TIMELINE

#### Meetings

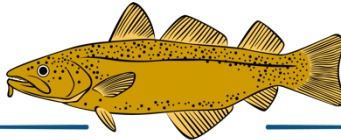
Item	04.2025	05.2025	06.2025
County Staff Check-In			
HOME Advisory Council Check-In			
News Update for Webpage & Newsletter			
Quarterly Report, Y2Q4			

#### Deliverables & Tasks

Project Element & Item	04.2025	05.2025	06.2025
II. Municipal & Affordable Housing Stakeholders Contact List - Maintenance			
II. Regional Affordable Housing Database - Maintenance			
III. Community Support Activities			

<sup>9</sup> The IMA would be unsigned until after each community had secured funding through their ATM. As such, if a community’s ATM did not approve funding for SRHS participation, the IMA would need to be revised before the remaining communities sign.

Barnstable County SHRS  
Program Implementation Plan  
October 2023



# BARNSTABLE COUNTY

CAPE COD REGIONAL GOVERNMENT

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