

# Proposal for Services: Affordable Housing Specialist

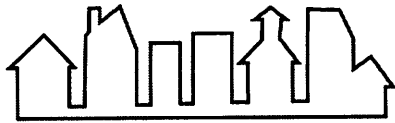
Town of Medfield

Submitted by:

**Community Opportunities Group, Inc.**

129 Kingston Street, 3<sup>rd</sup> Floor  
Boston, Massachusetts 02111

[www.cogincorp.com](http://www.cogincorp.com)



---

**Community Opportunities Group, Inc.**

129 Kingston Street, Third Floor  
Boston, Massachusetts 02111  
T: 617.542.3300  
F: 617.542.3302  
[www.cogincorp.com](http://www.cogincorp.com)

January 10, 2017

Ms. Kristine Trierweiler  
Assistant Town Administrator  
Medfield Town House, 459 Main Street  
Medfield, MA 02052

RE: Affordable Housing Consultant Services

Dear Ms. Trierweiler:

Community Opportunities Group, Inc. (COG) is pleased to submit this proposal to provide services to the Town in managing its affordable housing programs. Following your review of our proposal, we hope you will agree we are well-suited for this engagement.

After reviewing the RFP, we believe we have a clear understanding of the services you are seeking. We believe that our assistance in preparing Medfield's Housing Production Plan (HPP) provides us with an atypically strong insight as to the Town's service needs relating to affordable housing. Importantly, beyond our broad experience in assessing a community's housing needs and developing responsive strategies, we have experience in all three of the major task areas cited in your RFP: Monitoring services, Project consultant, and Assistance in the Formation (and development) of an Affordable Housing Trust.

We will draw on the talents and experience of various COG staff to provide you with appropriate "fit" for the particular task at hand. Beyond the varying skills of individual staff, the firm, as a whole, brings the following key strengths:

- **Wide and Deep Experience.** COG has a range of experience in assessing housing needs, developing plans, and in monitoring and compliance. This

- experience includes preparing discrete plans such as a Housing Production Plan (HPP) or a housing element of a community master/comprehensive plan. We understand the challenges that local communities face in meeting the legal mandates for having a fair share of affordable housing and the importance of having every qualifying housing unit counted on the SHI. We are experienced in conducting reviews and compliance monitoring relating to resident eligibility for occupancy in both ownership and rental affordable housing developments. Additionally, we have conducted impact reviews and have experience with zoning and development regulations.
- **Our Background in Housing and Community Development.** COG's housing *and* community development experience makes us different from many other consultants. The firm was founded to help New England communities address housing and community development needs. We built our excellent reputation by helping clients plan, fund, and implement projects that improved the quality of life for people who lived and worked in their communities. We review and qualify residents' applications for housing program assistance on a daily basis.

With a nearly exclusive portfolio of services to municipalities, our work covers a wide range of roles and responsibilities. Some clients hire us to directly provide administrative and implementation services. For other public agencies, and non-profits (e.g., community development corporations and housing organizations), we provide training, technical assistance and the development of administrative systems. We find it rewarding to assist clients to improve their capacity.

- **Expertise in Local Government Operations and Finance.** We are local government experts. Unlike many planning consultants, COG has direct local government experience: we know how to plan *and* implement because we have done both. We are "hands on" consultants who understand the day-to-day operations of city and town halls. Our work in community development makes us keenly alert to the realities of local capacity and the challenges communities face as they juggle competing agendas and needs.

The information that follows describes our qualifications and experience. We are confident that this information will firmly establish our suitability to assist you. For additional information, please visit our website at [www.cogincorp.com](http://www.cogincorp.com).

We have no known conflicts of interest with respect to this project. As President of Community Opportunities Group, Inc., a Massachusetts corporation, I am authorized to submit this proposal. If you have any questions, please contact me at (617) 542-3300, ext. 304, or via email at [psanborn@cogincorp.com](mailto:psanborn@cogincorp.com). Thank you for your consideration.

Sincerely yours,

COMMUNITY OPPORTUNITIES GROUP, INC.



Peter D. Sanborn  
President

## TABLE OF CONTENTS

Qualifications Summary .....	1
Project Staffing .....	5
Personnel .....	6
Executive Summary .....	10
Project Context .....	10
Project Approach .....	10
Scope of Services .....	13
1. Monitoring Services .....	13
2. Project Consultation .....	15
3. Assist in Formation of Affordable Housing Trust .....	15
Timeline and Availability .....	17
Subcontractors .....	17
Financial Stability .....	15
Insurance Requirements .....	17
References .....	18
Resumes .....	18

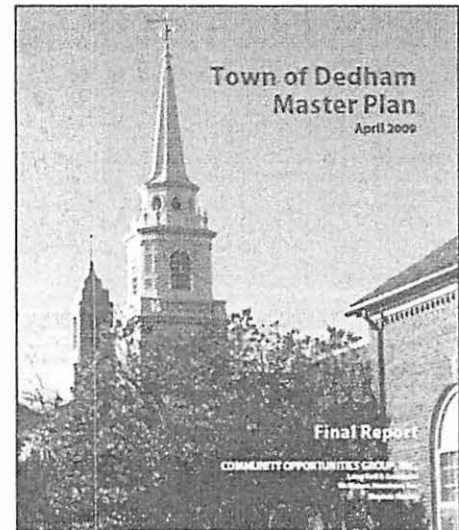
Certifications

## QUALIFICATIONS SUMMARY

Community Opportunities Group, Inc. (COG) was founded in 1979 to meet the housing and community development needs of cities and towns across New England. For many years, we focused largely in the HUD Community Development Block Grant (CDBG) Program and built our excellent reputation by helping clients *design, fund and implement projects* that improved the quality of life for people who lived and worked in their communities. Owing to our years of experience and the varied composition of our client base – from major cities in the Northeast to the villages of Berkshire County, Connecticut and New Hampshire – we became recognized experts in funding packaging and in implementation. Consequently, we helped communities reach goals that previously seemed unattainable.

Being one of the core service areas that COG provides, we are proficient in all aspects of grant and program administration: recordkeeping and reporting, compliance monitoring, financial management, environmental review, program design and programmatic requirements, and cross-cutting federal, state and local requirements.

COG has also provided technical assistance and troubleshooting services to clients experiencing performance difficulties. Over the years, we have been asked by local government grantees to conduct detailed reviews of program records, to document statutory and regulatory violations, to develop policies and plans to resolve deficiencies, and to provide training for local staff and officials.



COG's experience and roles are unlike those of many consultants in that we are experienced in planning, policy development, and implementation. Much of our work is as "hands-on" consultants with direct responsibility for program/project implementation. This experience ensures that we are current with policy, regulatory and compliance requirements. COG's experience in CDBG and other publicly-funded housing programs further strengthens our ability to assist clients in addressing housing goals. We have had responsibility for carrying out a range of housing initiatives including supporting new housing development (rental and ownership), public housing modernization, (re)development of special needs housing, first time-homeownership programs and rehabilitation of existing single- and multi-family housing.

The firm has been involved in these types of projects continuously since it was established more than thirty-five years ago. During this time, we have managed scores of local and regional housing rehabilitation programs for municipal clients and non-profits, providing a full array of services, from program development to outreach and marketing, to case processing and

eligibility determination, and underwriting to technical rehabilitation specialist services. Providing these services while assisting approximately 2,000 households means that COG has unparalleled experience, knowledge and insight. In short, we have **daily experience** in applying the myriad rules and regulations that accompany public requirements in carrying out these programs.

COG's success in the housing and community development field enabled us to expand the firm's professional horizons. We also provide technical assistance in downtown revitalization, housing development and regulatory compliance, and capacity-building services to help small non-profit organizations develop the wherewithal to grow.

Today, affordable housing, land use planning, and zoning occupy a major place in the firm's professional practice alongside community development. COG's engagements have included: master plans, district or area studies and plans, community visioning, asset and liability inventories, farmland preservation studies, open space and recreation plans, fiscal impact studies, growth management plans, housing studies, feasibility studies and predevelopment services. We also have in-house Geographic Information System (GIS) capacity. In addition, we have written zoning bylaws and wetlands protection regulations and provided peer review and impact analysis services to local permitting authorities.

Unlike many planning and development consultants, COG has direct local government experience: we know how to plan and implement because we have done both. We are "hands on" consultants who understand the day-to-day operations of cities and towns. With much of our work occurring on-site in offices in town halls, we are keenly alert to the realities of local capacity and the challenges communities face as they juggle competing agendas and needs. We also pride ourselves on our ability to understand and work with the political culture of each city or town that hires us.

While we have expertise in many areas, and supporting the preservation and development of affordable housing has always been at the core of our practice. The following list of projects demonstrates the breadth of our expertise in this field:

- *Affordable Housing Plans.* COG has prepared a variety of affordable housing studies, including Easton's Housing Production Plans in 2016, 2011 and 2005. Other recent plans have included Housing Production Plans for the towns of Phillipston, Royalston, and Medfield; and HUD Five-Year Consolidated Plans and First Year Action Plans for the City of Salem in 2005, 2010, and 2015. The preparation of these plans entailed thorough analysis of existing housing conditions, assessment of affordable housing needs, and the development of

concrete action plans to increase the supply of a local community's affordable housing.

- *Comprehensive/Master Plans.* COG staff have prepared (or served as team member for) numerous comprehensive/master plans for communities across Massachusetts. Currently COG is working on master planning efforts in Ayer, Newbury, Newburyport, and in Laconia, NH. COG was also member of consultant teams preparing master plans for Portsmouth, NH, and Easton and Arlington MA, providing background data, trends and issues analysis and/or the full preparation for master plan elements for Housing, Economic Development, Open Space, and Natural, Cultural, and Historic Resources. Housing elements for master plans typically provide a comparable analysis and strategy to Housing Production plans, but often integrate more comprehensive land use considerations beyond housing affordability.
- *Housing Program and Policy Assessments.* We have conducted program and policy assessments for dozens of comprehensive plans and also as stand-alone projects. We have conducted program and policy assessments for dozens of comprehensive plans and also as stand-alone projects. We completed housing program and policy assessments for Wareham, Lawrence, and Hartford, Connecticut. Recently in the towns of Ware, Warren and Hardwick, MA we completed a physical assessment of the housing conditions in dense, low income neighborhoods. In each town, the study areas are plagued by severe deterioration, a high percentage of absentee-owned rental property and a significant number of abandoned and foreclosed properties. The projects culminated in recommendations and strategies to revitalize the area.

The firm also provides a variety of affordable housing support services. We serve as marketing,, lottery and monitoring agents for affordable rental and ownership developments in numerous communities, and provide ongoing staff support to the Scituate and West Boylston Affordable Housing Trusts. We have assisted communities in defining programmatic objectives and in preparing Requests for Proposals/Qualifications to solicit developer interest in locally-sponsored affordable housing initiatives.

- *Market Analysis and Impact Assessments.* COG staff has carried out studies of housing, commercial, and industrial markets, as well as other potential land use scenarios, to support strategic planning for economic development and brownfields redevelopment. We have also evaluated the fiscal and community impacts of proposed development and policy changes, including affordable,



mixed-income housing and mixed-use development. Recent projects include market studies for the towns of Scituate, Millis, Raynham, and Sudbury, and fiscal impact studies for Berlin and Canton.

- *Zoning.* COG has prepared zoning ordinances and bylaws for several Massachusetts cities and towns. We are currently preparing zoning revisions in Newburyport.
- *Monitoring of Affordable Housing Developments.* We have served as monitoring agents for affordable housing developments (both rental and homeownership) in a number of communities, verifying compliance with state and local regulations. Examples of our work include both rental (Needham) and ownership (Needham, Newton and Scituate) developments. Also, we have been assisting the Scituate and West Boylston Affordable Housing Trusts. In Scituate, we prepared an LAU application and Affordable Fair Housing Marketing Plan for a LIP homeownership project, implemented the marketing plan, conducted a lottery, reviewed applications and assisted the Trust to locate eligible buyers. In our more recent work in west Boylston, we are assisting the Trust in its very early stage of developing additional affordable rental housing for seniors.

In addition to the experience cited above, the firm also provides comparable services in the usual course of its CDBG work. For rental units that receive CDBG housing rehabilitation financial assistance, there is an affordable rental agreement requirement, which requires the local community to conduct an annual monitoring to ensure that rental units remain occupied by an income qualifying household and that the rent is within Section 8 Fair Market Rent levels. With COG currently serving as the CDBG grant administrator for more than twenty communities, this annual monitoring is part of our contractual responsibilities.

COG also has considerable experience with helping communities develop specific local housing initiatives. Examples include:

- *Hope Street/Millville.* In the very small town of Millville (MA), we assisted with the disposition of a tax title property that resulted in the property's redevelopment for six affordable rental units. On the Town's behalf, we secured CDBG funds to provide partial development financing to make the project feasible without ongoing subsidies. We also guided the Town and developer through the LIP process (the first for each).
- *Former Sitkowski School/Webster.* Through a seven-year long, complex process, COG assisted the Town of Webster in redeveloping the decommissioned A.J. Sitkowski School into sixty-six units of low income

elderly housing and a new municipal senior center. To accomplish the redevelopment, COG assisted the Town with drafting a redevelopment overly zone for enactment by Town Meeting, and facilitated two-dimensional subdivision of the redevelopment site (the bulding was attached to the Town Hall). The firm also assisted the Town with the RFP process and vetting of responses. The non-profit developer obtained multiple allocations of federal and state historic and low income housing tax credits, thus enabling a large percentage of the units to be rented to extremely low income elders. The redeveloped building went into service in 2015.

- *Denault Drive/Wilmington.* In 2013, we assisted the Town of Wilmington (MA) in assessing the physical condition and identifying the needed improvements to return an abandoned, foreclosed single family home to an affordable home for a first-time homebuyer. The Town is in negotiation with the lender who is currently in possession of the property to ensure that it will be re-sold to an income-qualifying household.

## **Community Opportunities Group, Inc.**

---

### **PROJECT STAFFING**

#### **Community Opportunities Group, Inc.**

Peter D. Sanborn, Principal (Primary Roles: Contract Oversight and all Task Areas)

Roberta Cameron, AICP, Project Manager (Primary Role: All Task Areas)

Paula Stuart (Primary Roles: All Task Areas except Zoning)

Courtney Starling, AICP (Primary Roles: Task Areas 1 and 2, Zoning and Regulations)

Other COG staff may be assigned on an as-needed basis, depending on the services requested and the workload demands.

Peter Sanborn, President, will serve as Principal-in-Charge and will oversee the work team's schedule adherence. Mr. Sanborn will serve as the point of contact for the contract.

Resumes for the staff that will be assigned to this project are included at the end of this proposal.

## PERSONNEL

**Peter D. Sanborn, President, Principal-in-Charge.** A founding partner of COG, Mr. Sanborn has forty years of experience in community and economic development, historic preservation, project and construction management, site and project feasibility studies, and housing studies. He provides management and development consulting services to cities and towns, housing authorities and non-profit agencies throughout New England. Mr. Sanborn has been principal-in-charge of COG's community development efforts for all of the firm's Connecticut client communities, as well as for numerous municipal clients in Massachusetts. He also serves as Principal-in-Charge for the firm's planning portfolio. Currently, he has direct hands-on responsibilities as CDBG Program Manager or Director in Hampton, Stafford and Ellington, CT (representing a total of ten towns) and similar responsibilities in Somers. He serves as the principal consultant to the Town of Webster, MA, where the firm has had a wide range of affordable housing, community development and planning responsibilities since 1995. Mr. Sanborn's other current or recent work includes providing technical support to the Hingham (MA) Affordable Housing Trust, a Housing Production Plan for Kingston (MA), affordable housing compliance monitoring for large rental development in Needham (MA) and a property (building) assessment and re-use plans for neighborhood areas in Ware, Warren and Hardwick (MA), and eligibility and compliance responsibilities for lower income participants in CDBG programs. He holds a Bachelor of Arts from the University of New Hampshire, with post-graduate studies there and at Boston University.

**Wayne T. Darragh, Vice President.** Mr. Darragh joined COG as an associate in 1993 after completing a Master of Business Administration at the University of California at Berkeley. He previously served as town planner in Rockland, MA, and as an environmental engineer for HNTB Corporation in Boston. Mr. Darragh also holds a Master of Urban Affairs from Boston University and a Bachelor of Science in Environmental Engineering from Cornell University. He became a principal at COG in 1999. Mr. Darragh is MCPPO-certified and an EIT (MA #10498). He has served as principal-in-charge of COG's community development work in Amesbury, Mansfield, Methuen, Wakefield, Rockland and Woburn, MA, and several other locations.

**Roberta Cameron, AICP, Project Manager.** Ms. Cameron has more than twenty years of experience as a planner, specializing in economic development, housing and fiscal impact analysis. Prior to joining COG, she worked for several years at Larry Koff & Associates. In addition to her strong quantitative analysis and data presentation skills, Ms. Cameron has played key roles in community-wide master plans and area planning engagements, and she has co-led public participation program as designer and facilitator. She was co-author of the Housing Product Plans (HPPs) for the Towns of Phillipston and Royalston (2014). She also completed a HPP for the Town of Medfield (2014) and prepared a housing baseline analysis for

the City of Portsmouth, NH (2014) in the city's updating of its master plan. Ms. Cameron is COG's Project Manager and principal consultant to the City of Salem, where she has prepared the city's 2015-2020 HUD Consolidated Plan and Five-Year Action Plan. These plans are now pending final review by City staff and submission to HUD. She holds a Master of City Planning from Boston University and a Bachelor of Arts in Economics and Music from Mount Holyoke College.

**Paula Stuart, Associate.** Ms. Stuart has more than 28 years of experience in housing and community Development. While holding senior management positions in two Massachusetts cities, she designed, implemented and managed programs that have received HUD Best Practices awards and that were presented to the U.S. Congress as pilot programs. Ms. Stuart is a HUD-certified Public Housing Manager (PHM) and holds both state and national certifications as a homebuyer counselor. During her time in municipal government, she was responsible for writing and implementing inclusionary housing and linkage ordinances, and for developing, implementing and managing one of the first locally-funded Affordable Housing Trust Funds in Massachusetts. During the mid-1990s she led a large Massachusetts housing authority through a major transition period, resolving issues that had stalled modernization projects, assessing management systems and preparing a transition report for the authority's commissioners. In addition to her housing and community development experience, her background includes more than a decade of public relations, marketing and fundraising experience for large national organizations, hospitals and museums. She joined COG in 2007 has been involved in the firm's CDBG program work in Bellingham, Blackstone, Mansfield, Templeton, Abington and Wareham (MA), as well as in Hampton, CT. She has also developed and managed affordable housing compliance monitoring and affirmative fair housing marketing plans for Needham, Newton and Scituate, MA.

**Courtney Starling, AICP, Planner.** Ms. Starling works as a Planner specializing in zoning, land use, housing and economic development. Ms. Starling has more than 11 years of professional planning experience in rural, suburban and urban communities. Prior to joining the firm she held municipal planning and zoning positions in Brookline, MA, Shelburne, VT and Suffield, CT. Ms. Starling has particular expertise in analyzing, interpreting and writing zoning and related regulatory policy, as well as for reviewing development proposals. Since joining COG, she has worked on a range of planning projects, including developing baseline data and analysis for the economic development element of the Easton, MA and Portsmouth, NH master plans and the housing element of the Arlington, MA master plan, research relating to potential municipal fiscal impacts for a proposed resort casino in Milford, MA and zoning revisions for Foxborough, and Merrimac, MA. Currently, Ms. Starling is completing work on a master plan

for the City of Newburyport, as well as a comprehensive revision and re-codification of the City's zoning ordinance.

**Michael D. Pingpank, Senior Project Manager.** Mr. Pingpank has or is serving as the Program Manager for multiple CDBG grants in Bellingham, Franklin, Hubbardston, Northbridge, and Templeton, MA and in Ellington and Stafford, CT. He also served as part of a larger COG team working on an economic development plan for Ashland, MA, a master plan in Groton, MA and for the firm's fiscal impact analysis for the proposed resort casino in Palmer, MA. He is MCPPO-certified and is managing the disposition of a town-owned former mill site in Bellingham, MA. Working with Mr. Sanborn and other staff, he has led the property (building) assessment and re-use plans for neighborhood areas in Ware, Warren and Hardwick, MA. Mr. Pingpank holds a B.A. in Political Science with a minor in Visual Art from Union College and a Master in City Planning from Boston University. Mr. Pingpank's prior experience includes four years working with cities and towns at the Massachusetts Municipal Association and an internship with the New York State Association of Counties.

**Kathleen Kelleher, Associate.** Ms. Kelleher has extensive background and experience in the areas of social and economic justice, human rights and neighborhood-based community development. She currently serves or has recently served as Program Associate implementing community development projects and planning work for several client communities in Massachusetts and Connecticut, including Abington, Avon, Rockland, Webster, West Bridgewater and Whitman (MA) and Ellington (CT). She was the principal consultant and author of Healthy Communities study for the town of Lincoln, MA. This project won a 2011 APA-Massachusetts Chapter award for excellence. Prior to joining Community Opportunities Group, Inc., Ms. Kelleher was an Institute Justice Team Leader for the Sisters of Mercy of the Americas, working on justice issues relating to human trafficking, immigration reform and the practice of nonviolence. Earlier, Kathleen worked for a community development corporation on the south side of Chicago for nine years where she collaborated with residents and the City to create green space and affordable housing options, as well as moved multi-year community plans forward to meet City and community revitalization goals. Ms. Kelleher managed the *New Homes for South Chicago* single-family new construction project which won the LISC Non-profit Real Estate Project of the Year award for Chicago in 2005 as well as a national green-building award of excellence from Home Depot Foundation. Ms. Kelleher holds a B.A. in Political Geography and African Studies from Mount Holyoke College, a M. Div. from Catholic Theological Union and a Masters of Urban Planning and Policy from the University of Illinois - Chicago.

## EXECUTIVE SUMMARY

The Request for Proposals (RFP) clearly describes the services that Medfield is seeking from its consultant. We have the knowledge and experience to provide this range of services, as we have provided identical or comparable services for other clients. Our work at the local level (with communities, housing authorities and other local housing organizations) and with state agencies allows us to provide you with seasoned professionals who have worked in different environments and local "cultures." We have a reputation for a high standard of work and responsiveness to our clients. As can be seen in our staffing plan, we will deploy adequate staff resources to ensure our responsiveness to your needs. Our staffing for the contract will also avail you with our best talent for a particular task.

## PROJECT CONTEXT

As with most municipalities, the task of managing the affordable housing inventory is normally not a specific responsibility of municipal staff. "Affordable housing" is usually a secondary or adjunct part of the job responsibilities of planning and community development staff – if it is a part of any job description at all. The complexity of the regulatory requirements, as well as the many options available for local initiatives, adds to the challenge of preserving and increasing affordable housing. Many communities lack local staff with an adequate level of expertise to adequately oversee such efforts. Medfield shows foresight in hiring a qualified housing consultant to provide it with the diverse skill sets needed to proactively manage and promote affordable housing.

As stated, the purpose of this RFP is to procure professional assistance for the compliance and administration of the existing affordable housing portfolio, and to provide hands-on training and on-going support to the Town. The RFP intends to select a service provider who can demonstrate the experience and capacity necessary to deliver these services described below. As described throughout this proposal, we believe COG will be successful in providing the town with the resources and expertise it is seeking.

## PROJECT APPROACH

The RFP seeks services in three main task areas, with subtasks under each of the requested services represent inter-related and overlapping services. During the duration of the contract, we will develop monitoring plans, checklists, protocols, forms/templates and documents for use for ongoing administration, whether by us or someone else. At contract initiation, we will meet with key Town staff or officials to gain an understanding of the most critically needed areas of assistance, in order to maximize the benefits of our assistance within a presumed limited budget. If desired, we will train municipal staff in the use of the products that we develop and

provide ongoing technical assistance and support, both on- and off-site. We expect that the time commitment will be greater during the earlier stages of the contract and less at the later stages. We will provide these services on an hourly billing basis, unless there are clear tasks/products for which we can mutually agree upon a fixed fee.

The monitoring services task will ensure and enforce compliance of existing affordable housing restrictions with the goal of preserving the affordable units. Different affordable housing programs require different types of monitoring protocols. Even within the same funding agency, regulations and requirements have evolved over time and may not be identical from project to project. To address this, we recommend creating a summary of requirements for each development that will serve as the basis for carrying out the monitoring plan. Annual monitoring of rental units is more labor-intensive than homeownership units; most funding sources require annual income eligibility re-certification at lease renewal. Usually, the certification is based on primary source documents. If the *certifying agent's* files are complete and well-organized, the *monitoring agent's* review should be straightforward. However, it is our experience that the adequacy of the certifying agent's file can vary greatly; in this situation, it places substantially more demands on the monitoring agent.

Income eligibility certification is only required for homeowner units prior to initial purchase, as well as at the time of resale, if the unit transfers within the affordability period. Homeownership units must generally be monitored annually to determine that they remain owner-occupied, have not transferred ownership without approval, or have not been re-financed without authorization. Many homeownership projects allow for owners to make certain capital improvements. The cost of these can be added to the allowable re-sale price when the property is sold, provided they have been approved and valued in advance. This, too, is a monitoring function.

Some funding agencies require periodic unit inspections of rental units to ensure that they remain in compliance with local, state, and sanitary and building codes. It is important to recognize that the monitoring requirements of the Commonwealth, and other funders, are placing a greater emphasis on compliance certification by the responsible parties. This will require additional efforts by the municipalities moving forward. Due to the past and ongoing experience of COG, we maintain active contact with state-level agencies to ensure that we remain current with these changes as they occur. Accordingly, we will help the Town to remain abreast of all relevant regulations and requirements.

Monitoring services also include identifying and tracking compliance with specific local requirements and specific restrictions for each development. This effort is dependent on having a reliable repository of affordable housing units. If desired, we will assist with the creation of a



## **Community Opportunities Group, Inc.**

---

digital repository of these units. It will include all legal and regulatory agreements for each project, as well as a concise electronic database (e.g., Excel, Access) that condenses the requirements of those documents into key descriptive information about the projects, the units, the owners/managers, the type (ownership/rental), the affordability period, funding sources and specific monitoring requirements.

The repository will be the basis for the development and implementation of an effective annual monitoring plan which, in turn, helps ensure the town meet the objectives of ensuring that all eligible, affordable units are counted toward the Subsidized Housing Inventory, and that all are compliant with all applicable regulations and requirements. Moreover, it will enable the town to track the affordability periods of the units, and to plan for replacing or extending the affordability of units that are nearing the expiration of the affordability period.

This repository, which includes the essential documents and data, along with the annual monitoring plan, should be updated as new projects are formed, new units are created, units are bought and sold, and refinancing is transacted. The RFP's Core Services Task 2 is integral but subsidiary to the creation of the repository and the monitoring services.

COG's wide range of experience will be of particular benefit to the Town, given the range of services you are seeking: from preparing applications, surveys, training and education, to compliance and enforcement, to development reviews and impact analyses. One or more of COG's staff has experience in all of the tasks and sub-tasks listed in your RFP. Our size and experience will enable us to deploy the appropriate staff for the required task.

## SCOPE OF SERVICES / WORK PLAN

### 1. MONITORING SERVICES

We recommend creating and executing a monitoring plan, and a repository of project legal documents for all projects. These documents include initial zoning decisions (Special Permit, Comprehensive Permit, other), Regulatory Agreements (both homeownership and rental), Deed Restrictions, individual unit deeds and Certificates of Eligibility for ownership units, and other information such as, mortgages or liens, land disposition agreements, 40B Cost Certification Reports and other project specific information. Subsequent years will involve maintaining and updating the document repository.

The legal framework of each project, generally found in the Regulatory Agreement and Deed Restrictions and Zoning Documents, is reviewed and analyzed by the monitoring consultant. The role and responsibility of the municipality is identified. The units managed by public agencies, such as the housing authority or Department of Developmental Services, generally do not require any supplemental monitoring or municipal oversight, although they will be included in the central document repository and database, with information updated as necessary. The information that must be collected for each affordable housing project takes the form of individual files of the documents (both paper and electronic copies), a consolidated inventory of each development/project complete with project address/contact information, unit size mix, affordability levels, and DHCD SHI identifications. As needed, and as resources permit, we will assist the Coordinator in reconciling the local repository to the DHCD SHI listing. This might also include verifying the number of units for DDS/DMR/Housing Authority units. These efforts will result in the development of a central repository and an accurate listing on DHCD's SHI.

We will develop an annual monitoring plan to be carried out either by us or locally designated personnel. The plan will identify the monitoring process and develop forms for use in conducting the monitoring. Ideally, monitoring activities will be staggered throughout the year as dictated by the monitoring requirements of specific developments.

For rental units, where the municipality bears the responsibility of being the Monitoring Agent, the annual monitoring task will be to confirm that all units in the project are compliant. The effort for rental projects is mostly for the LIP projects. For these developments, the municipality is required to review the rents charged, review the certification (income eligibility) of the tenants, review that the units are maintained, ensure that tenant selection practices comply with Fair Housing laws, and to certify all the above to DHCD.

For non-LIP projects, the level of this effort is more discretionary as the municipality generally has no identified responsibility. However, a municipality may wish to obtain a general certification from the project sponsor that they are compliant with the requirements. For these projects, where the municipality is not the monitoring agent, we will identify the entity from which the Coordinator can obtain copies of annual monitoring reports (produced by the legal monitoring agent). If requested, we will review those reports to confirm the project is generally compliant.

If a monitoring review is thorough and extensive, compliance violations may be identified. These may be the result of lack of understanding of program guidelines, Fair Housing violations, general neglect, or lack of oversight, and not necessarily intentional. If this occurs, we will be available on request to serve as a resource to assist in outlining a proposed course of corrective action, so that a certification of compliance can be achieved.

#### DELIVERABLES

We will deliver the following items throughout the life of the contract. These items shall become property of the respective community:

- A template document to create the local affordable housing unit repository, including spreadsheets and checklists/matrices of required documents for a complete file for individual projects;
- Regulatory documentation and existing funding agency policies guidelines relating to units that qualify for listing on DHCD's Subsidized Housing Inventory;
- Annual Monitoring Plan, including forms and template materials that would be used during and as part of a monitoring; and,
- Memos and documents relating to completed compliance monitoring.

## **2. PROJECT CONSULTATION AND RESIDENT SERVICES**

COG will serve as the main point of contact for residents seeking affordable housing services. Normally, we will respond to such inquiries via phone and written correspondence on an ongoing basis throughout the project duration. Occasionally, direct one-on-one contact may be in order.

We will assist Town boards and committees in the review of site specific LIP or other Chapter 40B proposals, as well as provide support for Town-initiated projects: The assistance that we will provide includes, but is not limited to the items listed under the Project Consultation section of your RFP. These will be provided to the Town on an as-needed, as-requested basis. These services could include assistance with public education/information, advice and technical assistance to Town boards, the development of policies, procedures and regulations (such as

zoning revisions), affordable housing development guidelines, and early-on predevelopment support to the Town toward the goal of increasing the supply of affordable housing. The range of services could include:

- Evaluating parcels or Town-owned property and soliciting developer interest;
- Facilitating site and conceptual plan review, project concepts and designs;
- Preparing or reviewing project pro-forma budgets;
- Analyzing developer projects using locally adopted rules, State guidelines and regulations and best practices;
- Reviewing finalized plans with regard to the affordable component, including unit mix, disbursement, cost, governance, schedule, and marketing;
- Completing development impact reviews;
- Interacting with DHCD and Subsidizing Agencies;
- Providing comments on the Regulatory Agreement, and other local agreements as appropriate;
- Developing pro-forma deed restrictions for municipally sponsored projects; and,
- Preparing Local Preference justification.

### **3. ASSIST WITH THE FORMATION OF AN AFFORDABLE HOUSING TRUST**

We will provide support to the existing community development corporation and the Town's Affordable Housing Committee as it moves to an Affordable Housing Trust. In doing so, one consideration is whether or not retain the community development corporation. Beyond providing support to the organizational aspects, our assistance could also include services similar to those listed under Task 2 above.

### **TIMELINE AND AVAILABILITY**

We acknowledge the timeline and the performance expectation cited in the RFP and we are able to meet those. As can be seen, we have a depth of qualified staff persons that will enable us to meet any anticipated time demands of the services to be provided under this contract, including concurrent ones. We will be available to begin work within two weeks of execution of the contract.

### **SUBCONTRACTORS**

We do not anticipate retaining any subcontractors for this engagement. By the nature of our work, we have a network of technical and specialized professionals (engineers, architects, etc.) who we could identify if such extra services are needed by the Town. We understand that the Town would need to procure for those services.

## **FINANCIAL STABILITY**

As a firm that has operated continuously since being established in 1979, we believe that Community Opportunities Group, Inc. has the financial stability the town is seeking.

## **INSURANCE REQUIREMENTS**

The firm carries the insurance coverages shown in the table below. Our current insurance coverages meet the RFP's requirements.

<b>TYPE OF INSURANCE</b>	<b>CARRIER</b>	<b>LEVEL</b>
Professional Liability Insurance	Western World	\$1,000,000.00
Worker's Compensation Insurance	Twin City	\$ 500,000.00
Automotive Liability Insurance	The Hartford	\$2,000,000.00
General Liability Insurance	The Hartford	\$4,000,000.00

## REFERENCES

The following references represent a sample of similar and relevant projects that we have completed. The contacts for these projects will attest to the high quality of our work, our subject matter expertise, and our professionalism. We will be pleased to provide additional references upon request.

COMMUNITY / PROJECT(S)	CONTACT
<b>Town of Easton</b> Housing Production Plan Preparation (2006, 2011, and 2016) Budget: \$20,000 (2015/6 Contract)	Current contact in Easton is unavailable Ms. Martha White, Town Administrator Natick MA (508) 647-6410 <a href="mailto:mwhite@natickma.org">mwhite@natickma.org</a>
<b>Town of Natick</b> Local Action Unit (LAU) Review (2007-2008) Budget: \$45,000	<b>NOTE:</b> Ms. White was in Easton when the HPP was completed in 2006. We also worked under Ms. White in Natick on LAUs
<b>Town of Needham</b> LIP Rental and Homeownership Monitoring (2010, 2012-13, 2014-Current) Budget: Varied: \$5,000 -15,000 yearly	Ms. Kate Fitzpatrick, Town Manager Town of Needham (781) 445-7512 <a href="mailto:kfitzpatrick@needhamma.gov">kfitzpatrick@needhamma.gov</a>
<b>Town of Webster</b> CDBG and Numerous Housing Initiatives (continuously since 1995) Budget: Various, depending on contract; \$3,000 - \$100,000+	Ms. Carol J. Cyr, Director Webster Office of Community Development (508) 943-3800, x4004 <a href="mailto:ccyr@webster-ma.org">ccyr@webster-ma.org</a>
<b>Hingham Affordable Housing Trust</b> Preparation of Pre-Development Services RFP and Consultant Team Selection for Affordable Housing Development on Town Land (2010, 2014) Budget: Approx. \$5,000 per contract	Tim White, Esq., Chairman Hingham Affordable Housing Trust (781) 331-6900 <a href="mailto:tim@whiteandwhitelawyers.com">tim@whiteandwhitelawyers.com</a>
<b>West Boylston Affordable Housing Trust</b> Affordable Housing Services; Similar Scope to Medfield's RFP (2015 to present) Budget: Approximately \$20,000 annually	Ms. Anita Scheipers, Town Administrator (774) 261-4012 <a href="mailto:AScheipers@westboylston-ma.gov">AScheipers@westboylston-ma.gov</a> Ms. Patricia Halpin, Chair West Boylston Affordable Housing Trust

## **RESUMES**

### **Peter D. Sanborn**

#### **President**

#### **Experience**

A founding partner of Community Opportunities Group, Peter Sanborn has more than 40 years of experience in housing, community and economic development, historic preservation, project and construction management, site and project feasibility studies and housing studies. While responsible for the management and marketing of the firm, Mr. Sanborn is also a working principal who is directly involved in COG's day-to-day professional work.

Mr. Sanborn has been principal-in-charge of scores of COG's community development efforts, including those in Wareham, Webster, Avon, Salem, Wakefield, Maynard, Bellingham and Sheffield, Massachusetts, and in numerous communities in Connecticut. From late 2010 through March 2012, he was COG's principal staff person serving as Acting Director of the Community and Economic Development Authority in Wareham, MA.

Mr. Sanborn has expertise in grant writing and has secured CDBG and other funding for housing, infrastructure and public facilities projects, economic development, and public services for municipal clients. He has also implemented numerous other public grant programs and provided planning and construction project management to the firm's client communities. Mr. Sanborn continues his active involvement in CDBG grant management and implementation where he remains responsible for the firm's contracts in Connecticut and for several Massachusetts municipal clients. He serves as a CDBG and public procurement compliance specialist to clients and staff. He has been involved in the preparation of the City of Salem's Five-Year Consolidated Plan and in an assessment of housing programs for the City of Hartford.

Mr. Sanborn has led many of the firm's planning engagements and participates actively in the firm's ongoing planning work. He has led public participation efforts and committee-level work on planning projects and participated with other staff and firms on housing studies and community-wide master plans. Mr. Sanborn also assists clients in conducting service and facility needs assessments for targeted user groups and serves as liaison between clients and federal- and state-level agencies. He has been involved in the firm's preparation of ADA Transition Plans and 504 Assessments in the Towns of Winthrop, Rockland and Webster, MA and in Stafford, CT.

Prior to forming COG, Mr. Sanborn worked as a community development and management consultant at another consulting firm, where he supervised the firm's and contract staff in revising and unifying format of state air quality regulations for all U.S. states, territories and possessions, administered a 330-unit Section 8 Existing housing rental program under contract to a local Massachusetts housing authority, and completed numerous grant proposals and applications. Earlier in his career, he also worked as the

## **Community Opportunities Group, Inc.**

---

planning coordinator at the New Hampshire Division of Public Health's Office of Emergency Health Services.

From 1991-2007, Mr. Sanborn was a Board member (and past President) of Shelter, Inc. (now Heading Home), a Cambridge-based organization that provides emergency shelter, transitional, and supportive permanent housing and related services to homeless individuals and families in greater Boston. During his tenure as President, Shelter completed a new five year strategic plan and moved forward in aggressively implementing it, thereby achieving a significant expansion of its housing inventory and programs.

### **Education**

Masters in City Planning Program (graduate course work), Boston University.

Professional Development Courses, Graduate School of Design, Harvard University.

B.A., History, University of New Hampshire.

### **Professional Panels and Presentations**

Massachusetts Federation of Planning Boards and Boards of Appeals,  
Annual Meeting, October, 1998.

Boston Society of Civil Engineers, 1998.

### **Professional Affiliations**

American Planning Association

National Trust for Historic Preservation

Connecticut Community Development Association

Licensed Real Estate Broker, Commonwealth of Massachusetts

### **Community Service**

City of Boston, South End Landmark District Commission, Commissioner (Alternate), 2007-Current.

Former Member, Board of Directors, and Past President, Shelter, Inc. (now Heading Home), Cambridge, Massachusetts, 1991-2007.



## **Roberta Mitchell Cameron, AICP (Project Manager)**

### **Planner**

#### **Experience**

A planning consultant for over 20 years, Roberta Cameron has assisted in the preparation of community-wide master plans and targeted planning strategies in communities throughout Massachusetts and Rhode Island. Ms. Cameron has examined complex issues facing communities in the region and innovative alternatives for achieving community goals, especially in the areas of land use, housing, economic development, and zoning. She is skilled with using quantitative and evaluative analysis to creatively synthesize data from a variety of sources, as well as facilitating public process to respond to an understanding of relevant concerns. Recent projects have included impact assessments of proposed policy changes and development projects, and market analyses for improvement of town centers and other mixed use districts.

Before joining COG, Ms. Cameron worked with Larry Koff & Associates where she contributed to projects including master plans, housing and economic development strategies, zoning and fiscal impact analyses, and other targeted plans. Ms. Cameron coordinated quantitative analysis, research, and GIS mapping; conducted public outreach; and evaluated policy and market conditions, integrating a comprehensive perspective with an understanding of specific areas of concern. During this time, Ms. Cameron also collaborated with other consulting firms in the region, including Planners Collaborative Inc., John Brown Associates, Taintor Associates, and Todreas Hanley Associates, providing support in the preparation of numerous master plans, economic development, and downtown revitalization strategies.

#### **SAMPLE PROJECTS**

MILLIS DOWNTOWN MARKET  
ANALYSIS

STOUGHTON DOWNTOWN  
MARKET ANALYSIS

ASHLAND ECONOMIC  
DEVELOPMENT VISION AND  
ACTION PLAN

TOWN OF BELMONT  
COMPREHENSIVE PLAN

TOWN OF ARLINGTON  
ECONOMIC DEVELOPMENT  
PLAN

TOWN OF MIDDLEBOROUGH  
HOUSING PRODUCTION PLAN

#### **Education**

Master of City Planning, Boston University, Boston, Massachusetts

Bachelor of Arts in Economics and Music, Mount Holyoke College, South Hadley, Massachusetts

#### **Professional Affiliations**

American Planning Association

#### **Community Service**

Medford Community Preservation Act Organizing Committee

## **Paula Stuart**

### **Associate**

#### **Experience**

Paula Stuart has more than 28 years of experience in the housing and community development field. Ms. Stuart has written Consolidated Plans, prepared Analyses of Impediments, Comprehensive Housing Strategies and Annual Performance Reports, and has managed CDBG, ESG and HOME funds for Entitlement communities. She is a NAHRO-certified Public Housing Manager.

With this extensive experience and a background in grants writing and administration, Ms. Stuart joined Community Opportunities Group, Inc. in 2007. Since, she has prepared CDBG grant applications at COG for municipal clients in both Massachusetts and Connecticut and is currently serving as a grant manager for the firm's CDBG program work in several Massachusetts communities.

Before joining COG, Ms. Stuart worked as an independent consultant, assisting municipalities, private developers, and non-profit agencies seeking to build mixed-income housing in cities and towns across the Commonwealth.

Earlier, she was the Director of Housing at the Office of Planning and Development in Lawrence, Massachusetts, where she developed housing and homelessness policies and programs, and was responsible for new construction, first time homebuyer, and housing rehabilitation programs. She managed a Lead Paint Consortium of five High Risk Massachusetts Communities under a grant from the HUD Healthy Home Program, providing lead abatement to 500 housing units. While in Lawrence, she also led the City's Continuum of Care Committee, which had responsibility for preparing, submitting, and managing McKinney and ESG Grant funding and working with not-for-profit housing and service providers. She was responsible for designing and implementing programs that were integrated into the City's Annual Action Plans as part of the 5-Year HUD Consolidated Plan. During this time, Lawrence received a HUD Best Practices Award for being the first city in the nation to implement a Homeless Management Information System. As Director of Housing, Ms. Stuart was also responsible for integrating state-level housing initiatives and resources into the city's larger housing and community development efforts.

Ms. Stuart had an extended period of professional experience in Somerville, Massachusetts, where she served in several positions over a ten year period. She worked as a grants administrator within the Executive Office of the Mayor, as Interim Executive Director for the Somerville Housing Authority, and as the Director of Housing in the Somerville Office of Housing and Community Development (OHCD). She was also appointed Chairman of the City's Fair Housing Commission. While Chair, Somerville was chosen by the Massachusetts Commission on Discrimination (MCAD) as one of a select number of communities to hear fair housing complaints locally (under contract with MCAD).

While the OHCD's Director of Housing, Ms. Stuart had responsibility for an array of planning, programs and policies relating to housing. She researched and wrote the City's Analysis of Impediments to Fair Housing and implemented actions to remove identified barriers. Additional responsibilities included

## **Community Opportunities Group, Inc.**

---

administering the City's ESG and McKinney funds and developing the Continuum of Care Committee and Strategy. Policy changes at HUD during her tenure resulted in McKinney funds being awarded on a formula basis. To ensure an integrated approach to addressing homelessness, Ms. Stuart oversaw the creation of the Somerville Providers Group – an association of the city's shelter and services providers who worked with city government to craft comprehensive strategies for addressing homeless persons' needs and to prioritize local funding needs.

As Director of Housing, Ms. Stuart managed funding from four federal housing programs (CDBG, HOME, ESG and McKinney), the state-funded Weatherization and Heating Assistance Program, and the locally-funded Somerville Affordable Housing Trust Fund program. Ms. Stuart often worked closely with the City's Economic Development Director on joint housing/economic development initiatives involving reuse of city property, brownfields redevelopment and creation of live-work space.

### **Community Service**

Chair, Community Development Advisory Committee, City of Worcester, Current.

Member (City of Somerville Representative), Urban Ring Community Advisory Committee.

Member, Merrimack Valley AIDS Advisory Committee, 2001-2003.

### **Awards**

CASPAR, Inc. (Cambridge and Somerville Program for Alcoholism and Drug Rehabilitation), Heart-In-Hand Community Service Award, 2001.

VNA of Eastern Massachusetts, Community Service Award, 2000.

## Courtney Starling, AICP Planner

### Experience

Courtney Starling joined COG in 2013 and works as a planner specializing in zoning, land use, housing, and economic development. Ms. Starling has over 11 years of experience working in urban, suburban, and rural communities in Massachusetts, Connecticut, and Vermont.

Ms. Starling has worked on major planning projects such as master plans, comprehensive plans, district plans, housing plans, and economic development plans. In support of these projects, she has provided public outreach, statistical analysis, graphic design and visual aids, quantitative and qualitative research and data analysis, and GIS services. In addition, Ms. Starling has extensive experience writing and interpreting zoning bylaws and ordinances, performing market analysis, identifying challenges to obtaining desired development due to regulatory issues, and engaging the public to identify and address neighborhood issues. Ms. Starling is well versed in the local government administration and the regulatory framework in which they operate and has extensive experience working with the public and excels at disseminating complex concepts in an accessible and meaningful manner to all types and manners of participants and stakeholders.

Prior to joining COG, Ms. Starling worked as a Zoning Administrator in Shelburne, Vermont and a Regulatory Planner in Brookline, Massachusetts. In both positions, she was responsible for reviewing development proposals for conformance with zoning, building, and preservation codes as well as for drafting language for zoning articles. Through these experiences, Ms. Starling has also worked with the development of affordable housing, streetscape improvement projects, historic preservation, and local business outreach assistance. She also served as the GIS Administrator for the Town of Suffield, Connecticut.

### SAMPLE PROJECTS

FOXBOROUGH SIGN BYLAW

PORTSMOUTH, NH MASTER  
PLAN BASELINE ANALYSIS

SCITUATE, MA COMMERCIAL  
AREA MARKET ANALYSIS

PHILLIPSTON & ROYALSTON  
AFFORDABLE HOUSING  
PRODUCTION PLANS

EASTON MASTER PLAN

ARLINGTON MASTER PLAN

PEABODY ECONOMIC  
DEVELOPMENT STRATEGY

NEWBURYPORT ZONING  
ORDINANCE REVISION

### Education

Master of Regional Planning, *University of Massachusetts*, Amherst, Massachusetts

Bachelor of Arts in Geography and Urban Studies, *Wayne State University*, Detroit, Michigan

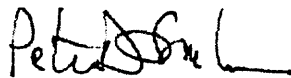
### Professional Affiliations

American Planning Association

**Attachment A**

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, joint venture, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.



\_\_\_\_\_  
Peter D. Sanborn, President  
**Community Opportunities Group, Inc.**

January 10, 2017

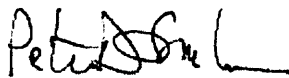
Federal ID #: 04-2674871

**CERTIFICATE OF TAX COMPLIANCE**

January 10, 2017

Pursuant to M.G.L.c. 62C §49A, I certify under, the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all law of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

**Community Opportunities Group, Inc.**



By: \_\_\_\_\_  
Peter D. Sanborn, President

Federal ID No.: 04-2674871