

BELMONT HOUSING TRUST, INC. 2010 ANNUAL REPORT

Authorized by Town Meeting in 1999 and then created by the state legislature (Chapter 126 of the Acts of 1999), the Belmont Housing Trust is a local body appointed by and answering to the Belmont Board of Selectmen. The Trust's purposes are: (1) to *investigate and implement alternatives for providing affordable housing* for persons of low, moderate, and middle income; (2) to enhance the Town of Belmont, Massachusetts and lives of its residents, and so lessen the burdens of government, by *promoting and undertaking the development and maintenance of affordable housing* for the benefit of persons of low and moderate income; (3) to *foster and promote community-wide interest and involvement* in the problems associated with the under-development of affordable housing, and toward that goal, to sponsor and participate in public symposia and discussions involving governmental officials, real property developers, and community organizations and institutions; and (4) to *assist parties in obtaining financial support for affordable housing projects* from state and federal agencies, foundations and other sources; and by any other means, to cooperate with, encourage, and contribute to the efforts of parties in the accomplishment of affordable housing purposes.

Major Milestones Achieved

On January 21, 2010, the Board of the Housing Trust voted to join the **Metro West Collaborative Developers**, a cooperative venture of four towns (Belmont, Lexington, Waltham, and Watertown) to pool resources for developing affordable housing. An Innovations Grant from the Massachusetts Housing Partnership in 2009 had supported efforts to organize the MWCD. Ann Silverman and Alisa Gardner-Todreas were elected as the Trust's representatives to MWCD. In the course of the spring, details of administration, funding, and operation were revised and refined.

Steve Laferriere, Housing Project Manager for MWCD, began working with the Trust by putting together a list of nine potential development projects in Belmont. He evaluated these, narrowed the list, and by May focused his primary attention on one site. After seeing proposed site plans prepared by Mostue and Associates, the Trust agreed to proceed with further exploration of this property for the possibility of eventual acquisition and development. By the end of the year Steve had made contact with the owner, developed revised site plans, and submitted preliminary zoning analysis and development costs, with prospective funding to include HOME and CPA money.

A significant milestone was reached in the cumulative total HOME funds obtained for the Town of Belmont since the Trust brought the Town into the federal program in FY03. In nine years, this funding has totaled just over \$1 million. Planning for future HOME fund uses is underway, as described above.

Waverley Woods, the award-winning development sponsored by the Housing Trust and completed in 2009, continued to provide high-quality rental housing for 40 families and individuals throughout 2010. Residents range in income up to 60 percent of the area median (the maximum allowed under tax credit rules). The Housing Trust met with residents and management there in April 2010 to get feedback and ideas for future projects. Although fully occupied, Waverley Woods always has an active waiting list. Those interested in an apartment there should call the management office for information: 617-209-2422.

Community Preservation Act

With active participation of members of the Housing Trust, a committee was formed in Town to evaluate the prospects for putting an initiative on the November ballot to adopt the Community Preservation Act for Belmont. The CPA allows communities to add a modest assessment to property taxes, matched by some level of state funds, to be used for affordable housing, historic preservation, open space protection and recreation. The committee decided to launch a campaign in the summer, first collecting the signatures needed to put the question on the ballot and then conducting a public education program. The Trust voted on August 19, 2010, to go on record as supporting this effort. On November 2, the CPA initiative was approved by the voters. The next step in implementing CPA is for Belmont to establish a Community Preservation Committee, the body that will evaluate proposals for use of CPA funds and put them before Town Meeting for a vote. The Trust looks forward to working with Belmont's Community Preservation Committee in the future.

Belmont Affordable Shelter Fund

The Belmont Affordable Shelter Fund (BASF) is an initiative of the Belmont Housing Trust. This local crisis intervention fund is used to address situations in Belmont involving a threat to a family's ability to maintain adequate shelter due to an inability to pay. Completely supported by local contributions, 100 percent of the funds are distributed as benefits to Belmont residents. As of 2010, through a new partnership with the Family to Family Project—a nonprofit homelessness prevention organization in the Boston area—contributions made to BASF can be tax-deductible.

Applications for assistance are generally not made directly to BASF. Instead, the majority of people in need are identified by the social outreach workers in the Town of Belmont's Department of Health. Some persons are referred by the Belmont Council of Aging (COA), and others come to us from various clergy or faith institutions in Town. We again thank Belmont Savings Bank for the free checking account it provides to BASF.

Since January 2005, BASF has made more than 125 grants totaling nearly \$28,000. Of these grants:

- More than 40% have helped to pay electric bills (Belmont Light);
- About a third have helped to pay natural gas bills (Keyspan);
- Almost 15 percent have paid fuel oil bills (various vendors);
- Roughly 10 percent went for rent payments; and
- About 1 percent have paid past-due water bills (Town of Belmont).

We anticipated a difficult winter of 2009-2010, due to the deep recession with still-high heating fuel prices. In fact, because of the dramatic demands placed on BASF during the 2009/2010 heating season, BASF ran out of money in 2010 for the first time ever. Limited funds meant grants were not made during the months of May through September. And total grant-making was down in 2010 (\$5,700) compared to 2009 (\$8,250).

Therefore, donations to the Fund are needed more than ever. Checks can be made out to Belmont Affordable Shelter Fund and mailed to Roger Colton at 34 Warwick Road in Belmont. Or (to claim a tax-deductible contribution) they can be made out to Family to Family Project, with BASF in the Memo line, and mailed to Family to Family at 14 Beacon Street, Suite 202, Boston MA 02108.

State Ethics Training

In accordance with State legislation passed in 2009, each member of the Board of the Housing Trust was required to successfully complete on-line ethics training and report to the appropriate Town official. All Board members met this requirement by the April 2, 2010 deadline.

Ballot Initiative to Repeal 40B Law

A statewide initiative qualified for inclusion on the November ballot that, if passed, would have repealed Section 40B of the Massachusetts General Laws, the section that allows for expedited zoning approval for developments with an affordable housing component, in jurisdictions that have not reached the goal of 10 percent affordable housing stock. At the June 17, 2010, meeting the Housing Trust approved the motion that "the Belmont Housing Trust takes the position to oppose repeal of the state statute Chapter 40B and adds its name to the list of supporters of 40B." The Citizens' Housing and Planning Association (CHAPA) took the lead in working to defeat the initiative; in November, it was voted down.

Meeting with Mark Paolillo

Newly elected Selectman Mark Paolillo attend the July 15, 2010 Trust meeting to talk about his background in Town (as a Town Meeting and Warrant Committee member) and to learn more about our activities. Members of the Trust introduced themselves, and Gloria Leipzig gave a summary report on Trust activities and accomplishments going back several years. This was followed by a discussion of potential development sites in Belmont for affordable housing, with Mr. Paolillo offering his views on Town building needs.

Annual Meeting of the Housing Trust

According to the Housing Trust Bylaws, an annual meeting is to be held in July; however, due to the meeting with Selectman Paolillo, this year's annual meeting took place on August 19, 2010. A decision was made in regard to officers, to create positions of co-chairs and vice co-chairs as a method of providing for transition in leadership. Judie Feins and Alisa Gardner-Todreas were elected Co-Chairs; Gloria Leipzig and Charles Laverty were elected Vice Co-Chairs.

Respectfully submitted,
Judith D. Feins (Co-Chair)

Members: Michael Battista (from September 2010), Roger Colton (through April 2010), Alisa Gardner-Todreas, Jonathan Jacoby, Gloria Leipzig, Charles Laverty III, Carla Moynihan (through June 2010), Ann Silverman, Ann Verrilli