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**Affordable Housing Committee Meeting Minutes  
Town of Orleans  
Tuesday, October 4, 2022 4:30 p.m.  
In person in the Nauset Room**

**Attending:** Fran McClennen, Bill Stoeckert, Nancy Renn, Susan Carlson, Elizabeth Paine, Marsha Allgeier as town liaison.

Nancy Renn, Chair, called the meeting to order at 4:30 p.m.

Nancy Renn introduced guest speakers Terry Barron from the Community Development Partnership, and Hadley Luddy, from the Homeless Prevention Council, to talk about the new Lower Cape Housing and ADU Resource Center.

The CDP and the Homeless Prevention Council, working with Sarah Peake, partnered to receive \$1M in ARPA funding, to create the Lower Cape Housing and ADU Resource Center, which was launched in April 2022. It covers 8 lower cape towns from Harwich to Provincetown, working on housing development, helping to create auxiliary dwelling units, administering a housing stabilization fund for residents who are outside of other housing program provision, and other services.

Regarding ADU's Terry noted that work with people who would like to explore the development of an ADU includes:

- A preliminary interview to review the program
- A feasibility study to determine eligibility
- Location of contractors, funding, permitting
- \$10,000 incentive if recipients rent year round for 5 years

Since launching they have had 40 inquiries including 3 from Orleans.

Interest was expressed in how Orleans can make this program more viable, by tracking ADU's in our area, and by a possible rental assistance program like those in Eastham, Wellfleet and Truro to bridge the gap between incomes and high rents. Hadley will provide the Committee with more information about this and also with more information about the need in Orleans.

There was a short discussion regarding the possibility of a tax rebate option like those used in other towns on the Cape.

Updated Housing Needs Study RFP

Marsha Allgeier reviewed changes made to the RFP in response to Affordable Housing Trust Board concerns. After discussion the Committee voted 5-0-0 to respond with an offer to have a

Trust member participate in consultant selection, and to have three joint meetings with the Trust during the project to focus on impact on policy.

#### Update on Housing Website

Marsha Allgier reported that she is developing a housing landing page that will lead to the AHC and Trust pages and other resources. Nancy Renn and Fran McLennen will propose changes to the AFC landing page and review these at the November meeting.

#### Governor Prence Redevelopment Plan

Fran McLennen reported that the Governor Prence Planning Committee will be winding down with a final report to the Select Board, the Town Planning Board, and the Affordable Housing Trust Board on October 19. She shared the five key points at the core of their report.

- The entire site should be devoted to housing uses, no other needs are as pressing
- The site should be primarily affordable housing developed with tax credits, with some market based housing if possible
- The site should be attractive, consistent with town buildings, environmentally responsible and an asset to the town.
- The site should be developed up to zoning level at 77 units, with recommendation for some allowances by reviewing Boards.
- The result should be a livable neighborhood, with a sense of place, with privacy, an attractive front, and a connection to the rail trail.

Fran also reported that

- There will be a Request for Interest (RFI) to support the development of questions to help structure the RFP.
- The Planning Board is considering a 40R district overlay to increase density, though the Planning Committee did not recommend this.

Options for upcoming meeting agenda items were proposed:

- The state of Accessory Dwelling Units in Orleans
- Restrictions on Community Preservation funds
- Opportunities for short-term rental taxes

The September 3 minutes were approved 5-0-0.

The next meeting will be held on Tuesday, November 1, 2022 at 4:30

The meeting adjourned at 5:30 on a vote of 5-0-0.

Minutes of this meeting were developed by Jennifer Fountain of the Affordable Housing Trust Board, and are as follows:

**JOINT MEETING OF AFFORDABLE HOUSING COMMITTEE  
AND AFFORDABLE HOUSING TRUST BOARD**

Minutes of Meeting  
Tuesday, June 7, 2022 – 4:30 p.m.

A joint meeting of the Affordable Housing Committee (AHC) and the Affordable Housing Trust Board (AHTB) was held in the Nauset Room at Orleans Town Hall on June 7, 2022 with real time public access provided by Orleans Channel 18 on the Town website and cable television

In attendance in the Nauset Room for AHC were Chair Nancy Renn, Ms. McLennen, Ms. Carlson, Mr. Stoeckart, Mr. Kendall, Ms. Wibby (also for AHTB) and Select Board liaison Andrea Reed with Ms. James on Zoom link. Also in attendance were Director of Planning and Community Development Mr. Meservey, Community Housing Coordinator Ms. Allgeier. Representing the AHTB were Chair Alan McClennen, Mr. Brehm, Mr. Herman, Mr. Ghory, Ms. Wibby and Ms. Reed.

1. Call to Order: Chair Nancy Renn called the meeting to order at 4.31pm.
2. Discuss proposed Affordable/Attainable Housing Website: Ms. Allgeier introduced the project to create a website to tell the “whole story of housing” including project updates of ongoing housing plans and projects as well as information and links to helpful information. She said she and Sarah Eaton, Media Program Coordinator, were looking for feedback on the structure of the site, content and need for routine maintenance and updates. It could be that external expertise would be needed for the development of aspects of the site and a funding grant from the CPC for education about housing existed for this purpose.

Ms. Eaton presented an initial concept for the Affordable/Attainable Housing webpages. A draft introduction was on the landing page with a calendar on the right and a bar on the left leading to topic areas such as: Projects, Documents & Presentations, Committees (i.e., AHC or AHTB), Resources (other information or groups/links), FAQ.

Discussion and input from members of both committees were offered. The need to speak clearly to audience segments was stressed and there was some discussion about defining who the main audience might be. Ms. Carlson suggested the goal of the site

was “to educate the general public, the voters, about housing.” It was suggested that actual photographs would help demonstrate housing in the Orleans area most effectively. It was suggested that the site include Orleans’ mission and goals around affordable and attainable housing. Search capabilities were discussed for navigation by people unfamiliar with the jargon of affordable housing. The need to clearly explain or define Affordable Housing, Attainable Housing and Community Housing was noted. Ms. Renn confirmed she would like to see the webpages get the story of housing out, to demonstrate plans and goals, and update the information about housing projects in Orleans. She asked for a working party be formed across both AHC and AHTB to join with Ms. Allgeier and Ms. Eaton on the web project.

**A working party was determined to include Nancy Renn, Fran McClennen, Michael Herman, Henry Brehm, Sarah Eaton, and Marsha Allgeier.** It was suggested that the working group would “jump start” the web project beginning with structure and currently available data but that an outside consultant may be need if richer content or design is required.

3. Review Scope of Work and Data Plan for Housing Needs Update Funding Request: Ms. Renn explained the need to update data to determine Orleans Housing Needs. A Scope of Work document was shared and a request from AHC to the AHTB for \$40,000 for the project was requested.

It was noted that in order to address the broad topic of housing needs, it might be necessary to reach beyond the AHTB’s focus on the 100% AMI threshold for housing needs. To view the future of housing needs, current housing needs at 120% or even 200% might need to be considered. Town Counsel may need to be consulted to determine whether AHTB can use funds to create a full picture of the housing environment or is limited to only to a fixed window of the current 100% of AMI environment.

Generally, the Scope of Work was considered appropriate although it was suggested that a shorter (3-5page) summary or digest accompany the full data-centric report, upon completion. Additionally, some people felt 10 years was too distant a viewpoint although fairly typical in government studies and forecasts.

Mr. Ward asked what the role of the AHTB would be regarding the work on the study. He wondered if there would be an opportunity for feedback or input from the Trust as part of the process. This launched a lengthy discussion regarding the control of the project, whether a liaison could report to or update the Trust, how and when feedback might be best sought and how it could be problematic. A long discussion probed the separation and overlap of responsibilities between the Committee and the Trust. Some AHTB members felt aspects of the study, such as housing stock goals, were of strong relevance to the Trust while pure data was not something the Trust sought to regulate. Trust Members stressed the Trust does not seek control of the project in total but simply

questions whether there would be opportunities for input. No decisions were reached and the AHTB will consider this at their next meeting and vote officially on the funding request.

4. Continuity of communication among Committee and Trust members: It was noted that when the Trust was initially formed, a member of the AHC also served on the Trust. This meant there was a de facto liaison between the two committees. The members discussed whether this was necessary to continue with a formal role of Liaison. It was broadly agreed (without vote) that close communication between the two chairs was a preferable way to liaise between the two committees.
5. Addressing housing needs outside the 100% of AMI parameters of the Trust: Mr. McLennen asked the group how the housing needs of the broader range of people could be addressed going forward. Currently, the Trust is charged with funding housing projects for those who meet 100% of AMI or less. Nantucket recently sought bonding to extend its range of housing needs. Alternatives might also be to form a separate Trust to address those earning above 100% AMI and still struggling with the housing crisis. Or a non-profit organization for Attainable Housing could be established.

It was suggested that the Trust redefine itself to also handle Attainable Housing through a bylaw change that is voted on at the October Town Meeting. Several people feel this is an appropriate next step and that the town is ready for the move to address the housing crisis.

6. Adjourn: Ms. Renn thanked Mr. Kendall for his service on the Affordable Housing Committee.
7. **Ms. Reed moved to adjourn the meeting. Ms. Wibby seconded the motion. All voted in favor. The meeting adjourned at 6:10pm**

With respect,  
Jennifer Fountain

### **Approval of AFC Minutes**

It was moved and approved by a vote of 5-0-1 to approve minutes of the May 3, 2022 meeting,

### **Next Meeting**

The next meeting is scheduled as a hybrid meeting Tuesday, July 5, 2022 at 4:30 in the Nauset Room.

Respectfully submitted  
Nancy James, Clerk

ADDENDA:  
April 28, 2022

## **AFFORDABLE HOUSING COMMITTEE**

# *DATA PLAN SUMMARY*

### 1. UPDATE 2017 HOUSING STUDY IN 2022-2023

#### A. Content

- i. Update key indicators of need in 2017 study (e.g., owner and renter cost-burdened households, rental unit gap)
- ii. Projections of housing need (five-year or ten-year)
- iii. Collection and analysis of data not included in 2017 study that is needed, such as:
  1. Persons working but not living in Orleans with low- and moderate-income household incomes.
  2. Persons/households not currently residing in Orleans who might want to move to Orleans, such as households with children attending Orleans schools, or seasonal homeowners who intend to move full-time to Orleans.
  3. Current and projected labor force needs.
  4. Estimates of new household formation (e.g., persons becoming adults and likely to form own households).
  5. Estimate of impacts of changing demographics on housing demand.
  6. Estimates of impacts of changes in seasonal home market on current housing stock.
  7. New or rehabilitated affordable/community housing and other housing available to low- and moderate-income households.
- iv. Analysis of the different types of needs of current low- and moderate-income cost-burdened homeowners: nature of needs that lead to different strategies to address {e.g., poor physical conditions, ability to afford ongoing operating/maintenance needs, need for different types

of housing (e.g., congregate living, assisted living, nursing care); need for supportive services, need for better access to meet daily needs, etc.}.

- v. Proposed goal for percent of housing stock that needs to be affordable/attainable to achieve Town goals in the long term.
- vi. Proposed new ten-year production goals (by categories: new construction/rehab; owner/rental; by income; by household type/size).
- vii. Identification of data indicators that can be updated on a regular (annual, biennial, five-year or other short interval) basis using readily available data sources.
- viii. Recommendations for data updates before next decennial census – types, means, effort/resources needed.

## B. Process

- i. Develop scope of work, estimated cost, and procurement process for consultant to update study.
- ii. Make request to Affordable Housing Trust for necessary funding.
- iii. Procure consultant.
- iv. Work with consultant to complete study and issue report.
- v. Recommend long-term goals for housing stock to be affordable/attainable.
- vi. Recommend new 10-year plan for adoption by Select Board.
- vii. Set up procedures for data updates before next decennial census.

## C. Estimated timeline

- i. Develop scope and RFP; secure funding: 2-3 months
- ii. Secure consultant: 2-3 months
- iii. Complete study: 6 months
- iv. Finalize recommendations: 2-3 months

## 2. REGULARLY MONITOR AND UPDATE DATA USED FOR PUBLIC EDUCATION AND COMMUNITY ENGAGEMENT

- A. Collect and analyze currently available data points and sources.

- B. Select indicators related to demographics, economic conditions, wage rates, real estate trends, and housing affordability that are useful for public presentations and materials and that are easy to update on a regular basis.
- C. Develop procedures and timetable for compiling and reporting annual or biennial data, including information that can inform budget deliberations and Annual Town Meetings.
- D. Develop and keep updated flyers to be used at Town Meetings when affordable housing warrants are being discussed.
- E. Develop and keep updated presentations to be used at public meetings.
- F. Issue periodic reports, including prior to budget adoption and Annual Town Meeting.

#### Town of Orleans

## HOUSING NEEDS ASSESSMENT SCOPE OF WORK

April 28, 2022

1. **Background and purpose.** The Orleans Affordable Housing Committee (AHC), working with a consultant, completed a Comprehensive Housing Study in 2017. The Study included a detailed assessment of the demographic, economic and housing characteristics of the Town and recommended strategies to meet housing goals and fulfill a vision for a safe and healthy community which a wide range of individuals and families can call home. On the basis of that study, the Town undertook a number of actions including establishing an Affordable Housing Trust Fund, appointing a governing board for the Trust, adopting a Ten-Year Plan for affordable housing production, and implementing several projects toward achievement of the production plan.

The AHC is interested in updating the Study, reassessing housing needs, and developing a new Ten-Year Plan for housing production. Once funding is secured, the AHC expects to secure consultant services and to do the following:

- 1.1. Update a few key indicators of affordable housing needs (rental and homeowner) contained in the 2017 study based on the 2020 Decennial Census and other data sources, expanding the analysis to a larger group of low- and moderate-income households (such as those with incomes above area median income).
- 1.2. Investigate sources for data not contained in the 2017 study including low- and moderate-income persons and households not currently living in the Town of Orleans but who may want to live, work, or establish businesses in Orleans.
- 1.3. Anticipate future needs based on projections of demographic changes, economic development trends, labor force needs and trends, new household formation,



conversion of seasonal homes to full-time homes, and other factors that would affect the demand and supply of housing.

- 1.4. Refine indicators of current and projected housing needs to extract information helpful to developing appropriate strategies, including the nature of homeowner needs, and the size/location/structural type of rental housing needs.
- 1.5. Work with the AHC to recommend housing stock goals, such as percentage of total housing that should be rental vs. homeowner, affordable to various income levels, and/or of different structural types.
- 1.6. Work with the AHC to develop housing production goals and articulate a new Ten-Year Housing Plan to recommend to the Select Board.
- 1.7. Develop a process to monitor changes between Decennial Censuses, issue reports on a regular basis (e.g., annual, biennial, every five years), using easily accessible data sources and links and requiring minimal work by Town staff or Committee members.

## **2. Tasks and deliverables.**

**2.1. Data Collection Plan:** Assess data sources on the federal, state, regional, and local levels that are (or are likely to be) readily available at minimal cost, which are available to provide the desired information. Identify a few key housing need indicators in the 2017 study that should be updated, such as cost-burdened households and unit gap analysis. Expand or redefine those need indicators to include a wider range of low- and moderate-income persons and households (such as up to 120% and 150% of area median income), needs of non-residents (such as workers commuting into Orleans and/or parents of children in local schools) who should be included. Project future needs for the next 5 to 10 years, utilizing established sources, such as updates of regional market projections by County and State agencies. Identify data gaps and investigate inexpensive ways to meet gaps through use of surrogate indicators from regional, state, and/or national sources, and local surveys, such as surveys of employees of the Town, public school system, and local businesses. Develop a proposed data collection plan that could be achieved within budget limitations.

***Deliverable:*** Report on selection and definition of key housing need indicators that should be analyzed and monitored to track progress, available data sources, and possible additional data collection measures, to be discussed with AHC, resulting in accepted data collection plan.

**2.2. Data Analysis:** Collect data from available sources and undertake new data collection. Compile and analyze the selected housing need indicators. Analyze components of need indicators to provide information on the nature of homeowner needs (e.g., substandard housing conditions, inadequate income to maintain property, need for energy efficiency, accessibility needs, suitability of size/location/structural type/ownership type), and the size/location/structural type of rental housing needs).

**Deliverables:** Report on updated housing need indicators, including explanation of changes since 2017 study. Report on the nature of homeowner and rental housing needs. Presentation of reports to AHC.

- 2.3. **Housing Stock Goals:** Provide definitions of housing units that should be counted toward low- and moderate-income housing goals, including affordable housing, community housing, and moderate-income housing. Collect data on numbers of housing units in each category that currently exist in Orleans. Recommend long-term goals for percentages of total housing stock in each category.

**Deliverable:** Report on current numbers and recommended long-term percentage goals for affordable and community housing and low- and moderate-income housing. Presentation of report to AHC.

- 2.4. **Housing Production Goals:** Based on current conditions and long-term goals, recommend a new Ten-Year Housing Plan for production of affordable and community housing, including definition of what will be counted toward achievement of the production goals (for example, types of assistance, requirements for deed restrictions or minimum commitment periods, when units are to be counted). For low- and moderate-income housing that does not qualify for federal or State assistance, recommend suitable strategies to pursue, such as encouraging the private housing market to meet goals.

**Deliverable:** Recommended Ten-Year Housing Plan and protocols for counting units, discussed with AHC.

- 2.5. **Plan for Updates and Reports:** Identify data points and indicators that can be accessed on a regular periodic basis to produce data updates on an annual, biennial, and/or five-year basis. Recommend an update schedule and protocols for issuing reports which require minimal staff effort or can be easily done by AHC members.

**Deliverable:** Recommended Plan for Updates and Reports, discussed with AHC.

**3. Timeline.** Work must be completed within six months of Notice to Proceed.

**4. Budget.** The project has a total budget of \$40,000.

## MEMORANDUM

### 3. TOWN OF ORLEANS

To: Affordable Housing Trust Board, Alan McClennan, Chair  
From: Affordable Housing Committee, Nancy Renn, Chair  
CC: George Meservey, AHT Members  
Date: April 28, 2022  
Re: Request for Funding for Housing Needs Update

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The Orleans Affordable Housing Committee (AHC) is requesting \$40,000 from the Orleans Affordable Housing Trust (AHT) to conduct an update of the housing needs assessment conducted in 2017. The attached Housing Needs Assessment Scope of Work describes the purposes of the update, lays out the major tasks and deliverables that would be asked of a consultant that would be secured through an RFP (Request for Proposals) process, and provides an estimated timeline and budget.

The AHC is making this request in response to the rapidly worsening affordable housing crisis in the Town of Orleans, on the entire Cape, the Commonwealth of Massachusetts, and throughout the country. This crisis has been exacerbated by the COVID-19 pandemic but has its roots in pre-pandemic conditions affecting the Town's economic health and the housing market. Although much of the 2017 study is still valid, additional information is needed to update, expand, and refine the picture of the Town's housing needs.

The AHC has developed a Data Plan that calls for an update in 2022-2023 based on the 2000 Census, leading to a new Ten-Year Housing Production Plan that would be recommended for adoption by the Town of Orleans Select Board after consultation with the AHT Board. The Data Plan also looks at other ways to monitor, use, and report information between decennial censuses that would be helpful to inform the community and assist the Town and the AHT in decision making. The Data Plan is also attached for your information.

The Committee would be pleased to discuss the request with the full Trust Board at a joint meeting of the two committees, if such a joint session were desired.