



Town of Orleans

Community Preservation Committee
9 School Road Orleans MA 02653-3699
Telephone (508) 240-3700 – Fax (508) 240-3388

FY25 COMMUNITY PRESERVATION PROJECT APPLICATION

SECTION A

Project Title: Forward at the Rock PHASE II
2023

Submission Date: November 20,

Applicant (*note if Town, individual or non-profit*): FORWARD (Friends Or Relatives With Autism & Related Disabilities)

Mailing Address: PO Box 1174, S. Dennis, MA 02660

Co-Applicant, if any (*note if Town, individual or non-profit*):

Mailing Address:

Project Contact Person: David Kaplan

Telephone: 508-397-6924

E-mail: dkaplan@go-forward.org

Federal Tax Identification Number (if non-profit): 46-4669643

Project purpose (*Check all that apply*):

Open Space Historic Preservation Community Housing
Recreation

Project Location/Address: 131 Hokum Rock Road, Dennis, MA 02638

Community Preservation Funding Request: \$75,000

Brief Project Summary, including justification of project category checked above:

FORWARD at the Rock PHASE II creates 8 new one-bedroom apartments providing extremely affordable and supported lifelong homes for Cape Codders with Autism and Related Developmental Disabilities. Although located in Dennis, the project is regional, with the state's Department of Developmental Services (DDS) selecting and supporting all residents. No town, including Dennis, will have preference, but it is important to note that even so, Dennis has provided the land and \$750,000 in funding to the project.

FORWARD at the Rock PHASE II

Unlike FORWARD's **Phase I** project, opened in 2020, and the Cape Cod Village group homes, these apartments are for residents who are able to live more independently, but still need supportive services, health and safety supervision, and access to 24/7 monitoring and support. The homes will be built at ground level, barrier free, with innovative assistive technology and special attention to sensory and mobility considerations. All apartments will be extremely affordable and restricted in perpetuity for those with incomes of less than 30% of area median income. These homes help to fill a gap in the available inventory of disability housing, and hopefully may offer some group home residents a path to more independence.

FORWARD at the Rock PHASE II creates desperately needed housing for some of the most vulnerable Cape Codders, and will be open to Orleans and all other Cape residents based on their diagnostic and financial need of these affordable and supported forever homes. No single town on its own can afford to build this complex special housing, and by its nature the project needs multi-town, County and state support.

Demonstrating the regional quality of this project, in addition to the Town of Dennis, the towns of Brewster, Yarmouth, Barnstable, Sandwich and Bourne have already contributed to the project, as has the Barnstable County government, and we currently have an application pending with the town of Chatham. The state will be contributing funding to the project, and we have been awarded eight Project-Based Vouchers which will subsidize all rents to 110% of Fair Market Rent, thus ensuring that the project will be financially sustainable, and selected tenants will be eligible for rent subsidies even if they don't have a rental voucher themselves.

We hope you will support this much needed Capewide Community Housing Project.

SECTION B

Detailed Narrative

Description of Project

FORWARD at the Rock PHASE II is new construction of eight (8) affordable and supportive one-bedroom apartments for Cape Codders with autism and related disabilities who can live independently and do not require a congregate setting with around-the-clock staffing, but do still need supportive services, health and safety supervision and access to 24-hour emergency response and caregiver support.

PHASE II is a Cape-wide multi-town regional housing project providing affordable forever homes for some of our most vulnerable and housing-insecure citizens. Supportive services for all residents will be provided by the Massachusetts Department of Developmental Disabilities (DDS) and nonprofit disabilities providers such as Cape Abilities. Affordability is restricted to incomes at or less than 30% of Area Median Income and all rents will be subsidized through project-based vouchers. These benefits will be open to all qualifying Cape Codders regardless of which town they currently reside in, and regardless of their ability to pay. This project will add 8 units to the Cape's inventory of desperately needed extremely low-income affordable housing and because residents are selected by the Cape and Islands Area Office of the Department or Developmental Services based on diagnostic and housing needs, no town has local preference for residence, including the Town of Dennis where the project is located.

All apartments will be built at ground level, and all will be barrier free, fully accessible, and designed to accommodate the sensory needs of residents with developmental disabilities. The building will include a common area for socializing with friends and family, skill training, shared meals and more. (Please see the attached Building Plans).

Each apartment will have direct front entry from the sidewalk, a fire suppression system with strobe, audible alarm, and connection to the fire department, a wheelchair accessible shower and sink, compact clothes washer/dryer, and a small but complete kitchen with full-sized appliances and roll-under sink and stove. Units will also have individual climate control, on-demand hot water, and automated fresh air intake and purification. The building will also have a common area for socializing, getting together with friends and family, skill training, shared meals, recreation, games, workouts, and more. The space will include a television viewing area for sports and movie nights, a kitchenette for life skills training and shared meals, exercise equipment, and a game and ping-pong table. An outdoor recreation and socializing area will also be provided along with extensive pathways.

The decision to build apartments for supported independent living was based on an assessment of the housing needs of the Cape's developmentally disabled population (see the attached Housing Needs Study). Although all forms of housing are needed for these vulnerable and housing insecure members of our community, it was determined that these apartments presented the most immediate need and had the highest likelihood of getting built on a timely basis.

All 8 units will be *Extremely Affordable** to help address the acute shortage of appropriate and fully accessible housing for Cape Cod adults with developmental disabilities. Residents will be selected from across the Cape based on their immediate housing vulnerability and on-going need for supportive services. This construction will expand the housing inventory at our building site at 131 Hokum Rock Road in Dennis, where in 2020 we opened FORWARD at the Rock Phase I, two side-by-side group homes with around-the-clock staffing accommodating 8 residents with profound disabilities.

FORWARD at the Rock PHASE II

*Incomes of 30% or less of Area Median Income, with no resident paying more than 30% of their total income. See attached Phase I multi-town Affordable Housing Restriction

Upon opening, those specially designed homes were immediately fully occupied, and have now been operating as intended for almost three years. The project was opened on time and on budget, and now serves as a compelling example of a very successful municipal/state/nonprofit multi-town partnership. As with PHASE II, residents of those homes were selected, placed and served by the State's Department of Developmental Services (DDS), and 24/7 staffing and supports are provided by Cape Abilities. Of the eight residents, one each comes from Orleans, Sandwich, Yarmouth, Wellfleet, and Dennis, and three from Barnstable. Further, over \$1,000,000 in funding came from Community Preservation Committees in Barnstable, Yarmouth, Brewster, Dennis, Mashpee and Chatham.

No single Cape Cod town has the resources to undertake this type of project. The need for affordable and supportive disability housing is clear and well-documented, but building affordable housing for this special population is expensive and complicated. To be successful, FORWARD needs the support of the whole Cape community, including individual towns like Orleans. To-date, the towns of Dennis, Barnstable, Yarmouth, Bourne, Sandwich and Brewster have already stepped-up with \$1,543,500 in funding for PHASE II, and Barnstable County has awarded another \$326,500. Other sources include FORWARD's owner equity, energy efficiency rebates, individual, business and foundation support, with expected funding from other CPCs, \$1.5+ million in state funding from EOHLC/CEDAC (see attached Letter of Support), and a commercial mortgage.

FORWARD will be responsible for all maintenance and capital repairs, and expenses will be funded by cash flow from rents. FORWARD will also maintain a Capital Reserve Fund to cover any unanticipated capital expenses. To minimize ongoing utility costs, the apartments will be high performance all electric homes, with heat pump heating, cooling and hot water, and a continuous super-insulated building envelope.

We have been awarded Project-Based Vouchers which subsidize all apartments at 110% of area Market Rent as determined by HUD, and will pay for up to 3 months vacancy per unit per year. Based on 2024 Market Rent, that will generate \$167,376.00 of annual income.



Project Goals and Objectives:

1. Build 8 one-bedroom apartments providing safe and supportive homes for Cape Codders with Autism and other Developmental Disabilities who need extremely affordable specialized housing.
2. Efficiently bring the project to full occupancy as designed, and on-time and on-budget.
3. Ensure the facility operates as planned for the benefit of the residents, providing appropriate, affordable and supported forever homes for Cape Codders with Developmental Disabilities.
4. Ensure long-term sustainability by funding capital and operating reserve funds, and operating the facility with positive cash flow enabling payment of the mortgage and high-quality maintenance of the property.
5. Build with optimum safety and minimal impact on the neighborhood.
6. Build an efficient all-electric sustainable home.
7. Demonstrate that Public/Nonprofit partnerships can work effectively to create new regional affordable housing.
8. Advance FORWARD's capacity to build additional specialized affordable housing on Cape Cod.

Consistency With Community Preservation Act Goals

FORWARD at the Rock PHASE II will be extremely affordable ($\leq 30\%$ of Area Median Income) which fits within the Community Housing component of the Act:

Community Housing: Acquisition, creation, preservation, and support of community housing defined as housing for low and moderate income individuals and families, including low and moderate income senior housing.

Further, **PHASE II** is responsive to the Act's recognition of the importance of regional projects. As stated by the Community Preservation Coalition:

"The CPA statute (MGL Chapter 44B) specifies, in Section 6, that CPA funds can be expended "in any city or town", presumably, of the Commonwealth. When the Legislature amended the CPA statute in the summer of 2012, one phrase was added to Section 5 (b)(1) specifically to encourage CPA communities to study and contemplate funding regional projects, as indicated in the following excerpt: "The Community Preservation Committee shall study the needs, possibilities, and resources of the city or town regarding community preservation, including the consideration of regional projects for community preservation." Thus far, regional projects have been proposed in every CPA programmatic area, though the most common ones are in the areas of active recreation and open space preservation."

If awarded funding, FORWARD will enter into a Affordable Housing Restriction for the project through the MassDocs closing process to satisfy Section 12 (a) of the Community Preservation Act:

Section 12. (a) A real property interest that is acquired with monies from the Community Preservation Fund shall be bound by a permanent restriction, recorded as a separate instrument,

that meets the requirements of sections 31 to 33, inclusive, of chapter 184 limiting the use of the interest to the purpose for which it was acquired.

Compatibility with the Orleans Community Preservation Plan and the Orleans Comprehensive Long Range Plan, and relevance to the community and its needs:

From the Orleans Community Housing Study – Development Strategies

“Further explore regional partnerships There is a precedent for regionalism with respect to housing on the Cape including the recent Orleans’ Cape Cod Village special needs project that received CPA contributions from not only Orleans but also the towns of Brewster, Chatham, Eastham, Provincetown, Truro, and Wellfleet totaling \$950,000. There are additional opportunities for regionalization including the creation of the Cape Community Housing Partnership among other potential approaches.”

“Support agencies that address the emergency housing needs of residents to reduce homelessness The Town should continue to support local and regional organizations that address the needs of those who are homeless or at risk of homelessness including the Homeless Prevention Council of the Lower Cape, Lower Cape Outreach Council, Harwich Ecumenical Council for Housing (HECH), and Cape and the Islands Regional Network on Homelessness for example.”

The Housing Study also notes Indicators of Need:

“*Significant local population with disabilities* - Of all Orleans residents in 2015, 830 or 14.3% claimed a disability, higher than the county and state levels at about 11% and 13%, respectively, and representing significant special needs within the community. The percentage of seniors with disabilities increased to 23% of all those 65 years of age or older.”

“*Long waits for subsidized units reserved for the disabled* – As noted earlier, there are waits of up to seven years for those who apply for Orleans Housing Authority units that are reserved for people with disabilities, younger than age 60, in elderly developments.”

“*High costs of housing has a profound effect on those with disabilities* – Those with disabilities who are unable to work full-time or are reliant on Social Security Disability Income have some of the greatest challenges in finding stable, decent and affordable housing that meets their special needs. While Orleans has a number of group homes for special needs populations, more such housing is likely needed as some of the lower income non-elderly, non-family households included in the figures summarized Table V-16 with severe cost burdens likely include those with disabilities.”

The project also substantially comports with the goals and guidelines of the Orleans Community Preservation Committee, except, of course, this housing will be built in Dennis. It is important to note that this type of specialized supportive housing cannot have local preference for residency, but it will be open to the citizens of Orleans based on their financial and special needs, and one of the residents currently living in FORWARD at the Rock came from Orleans. Residents are selected by the Department of Developmental Disabilities, and neither the Town of Dennis or FORWARD are part of or privy to those decisions.

Action Plan and Timeline:

Timeline:

- Completed: Pre-Development Design and Engineering
- Completed: Dennis Select Board Approval
- Completed: Ground Lease and Site Control Secured
- Completed: Dennis Zoning Approval – Special Permit Issued
- Completed: Old Kings Highway Historic & MA Historic Approvals
- Completed: Environmental Site Assessment Conducted, No Issues Found
- Completed: Department of Developmental Services Certification
- Completed: Awarded Project-Based Rental Vouchers for All Units
- March 15, 2024: Final Bids From General Contractors
- March 30, 2024: Contractor Selected
- April 30, 2024: Building Permit Application Filed
- May 15, 2024: Capital Fundraising Complete
- June 15, 2024: Building Permit Issued
- July 1, 2024: Site Work Commences
- July 30, 2024: Final Closing on Financing (MassDocs)
- September 1, 2024: Foundations Complete
- October 15, 2024: Panelized Exterior Framing & Sheathing Complete
- November 15, 2024: Roofing & Exterior Windows & Doors Complete
- December 30, 2024: Rough HVAC, Plumbing, Electric Complete
- March 1, 2025: Exterior Trim & Siding Complete
- March 15, 2025: Interior Framing Complete
- April 15, 2025: Insulation, Drywall Complete
- May 15, 2025: Interior Trim Complete
- May 30, 2025: Flooring and Cabinetry Complete
- June 30, 2025: Finished Painting, HVAC, Plumbing & Electrical Complete
- July 30, 2025: Occupancy Permit Issued
- August 15, 2025: Dept. of Developmental Services and EOHLC Compliance Completed
- August 15, 2025: OPEN FOR RESIDENTS

FORWARD is ready to start construction as soon as all of the needed capital funding is committed. We believe that our funding/financing goals will be reached in spring 2024, with groundbreaking in late spring 2024, construction commencing in the summer of 2024, and completion by summer of 2025.

Our development team is in place and includes:

- Housing Assistance Corporation (Development Consultant)
- Union Studio (Architect)
- Horsley Witten Group (Civil Engineer)
- CLEAResult (Building Performance Consultant/HERS Rater)
- Engineering Design Services, Inc. (Mechanical, Electrical, Plumbing and Fire Protection Engineer)
- Gary Barber (Clerk-of-the-Works)
- FORWARD Building Committee (Board and Outside Members)
- As well as a permitting attorney, closing attorney, accountant, CPA

Site control is secured. The project received zoning approval from the Dennis Planning Board on October 17th, 2022 under the Town's Affordable Housing By-Law, and the project has been approved by the Old King's Highway Historic Committee and Mass Historical Commission. The project is sited on 4.6 acres of town-owned land already leased to FORWARD for 99 years. (See attached Organization Profile and Budget and Financial Information)

Financial Data:

(See attachments for additional financial information)

**FORWARD PHASE II SOURCES
PROJECTION**

November 20, 2023

Current Commitments		
Dennis CPC/Housing Trust	\$750,000.00	Committed
State Funding Earmark	\$85,000.00	Committed
Yarmouth CPC	\$180,000.00	Committed
Brewster CPC	\$120,000.00	Committed
Sandwich CPC	\$43,500.00	Committed
Bourne CPC	\$75,000.00	Committed
Barnstable County ARPA	\$326,000.00	Committed
Barnstable CPC/Housing Trust	\$375,000.00	Committed
Owner Equity	\$200,000.00	Committed
Energy Rebates (MassSave)	\$80,000.00	Committed
TOTAL	\$2,234,500.00	
Pending		
State Funding - CEDAC/FCF	\$1,500,000.00	In Process (Project Vouchers Awarded)
Sub Total	\$1,500,000.00	
Other		
Chatham CPC	\$75,000.00	Applied
Orleans CPC	\$75,000.00	Pending 11/20/23 Application
Foundations/Donations	\$50,000.00	TBD
Total Other	\$200,000.00	
Mortgage	\$750,000.00	Estimate Pending Final Pricing
TOTAL PROJECT SOURCES	\$4,684,500.00	
TOTAL PROJECT USES	\$4,938,122.87	Estimate Pending Final Pricing
GAP	-\$253,622.87	

FORWARD at the Rock PHASE II

Construction Budget	
Construction Uses	
Concrete	\$250,000
Masonry	\$0
Metals	\$0
Rough Carpentry	\$275,000
Waterproofing	\$0
Finish Carpentry	\$200,000
Insulation	\$60,000
Roofing	\$62,500
Sheet Metal and Flashing	\$18,750
Exterior Siding	\$95,000
Doors	\$50,000
Windows	\$150,000
Fencing	\$80,000
Drywall Gypsum Board Systems	\$44,051
Tile Work	\$37,100
Acoustical	\$20,000
Resilient Flooring	\$42,786
Carpet	\$0
Paint & Decorating	\$56,016
Specialties	\$0
Cabinets	\$102,759
Special Equipment	\$20,000
Appliances	\$40,000
Blinds	\$4,000
Special Construction	\$75,000
Elevator or Conveying system	\$0
Plumbing & Hot Water	\$175,000
Heat & Ventilation	\$250,000
Air Conditioning	\$0
Fire Protection	\$54,531
Electrical	\$300,000
Maintenance Building	\$0
Solar Generation & Storage	\$70,000
Other/misc.	\$27,197
Subtotal Structural	\$2,559,689
Site Work	Budget

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Earth Work	\$400,000
Site utilities	\$62,500
Road & Walks	\$82,500
Site Improvement	\$76,250
Geotechnical Conditions	\$0
Landscaping	\$76,250
Environmental Remediation	\$0
Demolition	\$0
Unusual Site Conditions	\$31,250
Subtotal Site Work	\$728,750
Total Improvements	\$3,288,439
Builder Fees	Budget
General Conditions	\$133,106
Payment and Performance Bond	\$27,260
Building Permits	\$0
Builder's Overhead	\$150,000
Builder's Profit/Fee	\$150,000
Total Builder Fees	\$460,366
Total Construction Cost	\$3,748,805
Construction Contingency	\$374,880
Acquisition Costs	Budget
Acquisition: Land	\$0
Acquisition: Building	\$0
Total Acquisition	\$0
Soft Costs	Budget
Architecture and Engineering	\$260,000
Survey and Permits	\$10,000
Clerk of the Works	\$0
Environmental Engineer	\$4,500
FF&E	\$0
Bond Premium	\$0
Legal	\$55,000
Title and Recording	\$1,500
Accounting & Cost Cert.	\$0
Marketing & Rent Up	\$0
Real Estate Taxes	\$0

FORWARD at the Rock PHASE II

Insurance	\$20,000
Relocation	\$0
Appraisal	\$5,250
Security	\$0
Construction Loan Interest	\$5,000
Predevelopment Loan Interest & Fees	\$0
Inspecting Engineer	\$25,000
Financing Fee	\$7,500
Fee to:	\$0
LIHTC Fees	\$0
Development Consultant	\$10,000
Other Consulting Fees: HERS	\$10,000
Other Consulting Fees:	\$0
Other Non-Consulting Fees	\$0
Total Soft Costs	\$413,750
Soft Cost Contingency	\$20,688
Developer Fees / OH	Budget
Developer Fee	\$175,000
Developer Overhead	\$175,000
Total Developer Fees / OH	\$350,000
Reserves	Budget
Reserves	\$30,000
TOTAL DEVELOPMENT COST (TDC)	\$4,938,123

Please See the Following Attachments:

- A. Building Plans
- B. Letters of Support
- C. Organization Profile
- D. Housing Needs Study
- E. Sample Affordable Housing Restriction
- F. Budget and Financial Information