

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

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**Date Application Submitted:** July 1, 2019

**Name of Project Applicant:** FORWARD (Friends Or Relatives With Autism & Related Disabilities)

**Name of Co-Applicant(s), if applicable:** N/A

**Name of Contact Person:** David Kaplan

**Contact Person's Mailing Address:** FORWARD, PO Box 1174, South Dennis, MA 02660

**Contact Person's Daytime Phone Number:** 508-397-6924

**Contact Person's email Address:** [dkaplan@go-forward.org](mailto:dkaplan@go-forward.org)

**Proposed Project Name:** FORWARD at the Rock

**Project Address (or assessor's parcel ID):** 131 Hokum Rock Road, Dennis, MA 02638

### **Project Synopsis:**

**FORWARD at the Rock** is a new regional housing community which will provide affordable and supportive homes for 8 adults (age 22 and up) with Autism. The project will consist of two side-by-side houses with each house containing 4 bedrooms (units) built on 4.6 acres of town-owned land in Dennis. All units will be affordable, and we anticipate that all resident incomes will be at less than 30% of the Area Median Income and all will be on Supplemental Social Security. All residents will be eligible for Department of Developmental Services rent and service supports.

**FORWARD**, the developer of the project, has partnered with Cape Abilities to manage the homes and provide around-the-clock staffing in each home. The Commonwealth's Department of Developmental Services (DDS) will select and place residents with "severe" autism who qualify for DDS Priority One supports and services. As of this date the project has received funding from the Commonwealth and the Dennis, Barnstable, Yarmouth and Brewster Community Preservation Committees, private giving and an institutional mortgage, altogether totaling \$2,537,000, leaving \$98,400 left to raise – just 3.9% of the total project cost.

**Category:** ☒ **Community Housing**

**CPA funding requested \$ 75,000 Total Cost of Proposed Project \$2,635,400**

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

### PROJECT DESCRIPTION

**Please describe your project, answering all of the following questions in the order presented. Applications will be considered incomplete if all requested information is not provided. Include supporting materials (maps, diagrams, photos, etc.). Please number pages of application.**

**1. Project Description: Describe the proposed project. Is this part of a larger project or an ongoing project?**

FORWARD will be building **FORWARD at the Rock**, a new regional supportive housing community to provide homes for 8 adults (age 22 and up) with Autism. The project will consist of two houses sharing a common courtyard, with each house containing 4 bedrooms (units) built on 4.6 acres of town-owned land in Dennis. All 8 units will be reserved for residents with incomes less than 30% of Area Median Income, we anticipate that all residents will be on Supplemental Social Security, and all residents will be eligible for Department of Developmental Services rent and service supports.

FORWARD and our project partners have been given an exceptional opportunity to design housing that sets a higher standard of living for individuals with Autism and related disabilities. This thoughtfully developed new housing community will offer a greater level of wellbeing for residents by incorporating design elements that support their special needs. Once built, the complex will provide a fully supervised residence which meets the criteria for state-supported funding for low-income housing and delivery of services for this unique population. The project is being developed in response to the continuing unmet needs of a neglected and growing population of housing-insecure adults with Autism and related disabilities. FORWARD recognizes that adults with Autism, often requiring significant support, deserve access to housing that enables them to lead secure and fulfilling lives in a specially adapted home environment that provides safety and independence.

**FORWARD at the Rock** will be designed to fit into the surrounding neighborhood as a “Cape Cod traditional” style duplex house with discreet parking for residents, staff, and visitors. Intended to be a home environment where residents can age in place, it will be one level designed for ease of mobility. The property is part of a 15 acre parcel located in a peaceful, wooded residential area approximately one mile from Dennis Village and close to local amenities.

Key to this project will be special accommodations to meet a spectrum of resident needs. Limitations in movement, vision, hearing, cognitive ability, constrained space, behavioral difficulties, perception issues, pain, and other limitations can create obstacles to their enjoyment and ease of life — and often create a constant baseline for anxiety. Ideal housing for people with Autism and related disorders includes ADA accessible accommodations and design considerations for special building materials and furnishings, light, space, and multi-sensory therapeutic needs.

The complex will consist of two single-story four-bedroom homes attached with a vestibule that provides access to a rear courtyard. Each home will provide four single bedrooms (8 in total) with semi-private resident bathrooms (one full bathroom per two residents), and common kitchen, living, and recreational areas, a small workspace for 24/7 staff, and a common 1/2 bathroom for staff, visitors and residents.

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

Because the housing is being developed from the ground up specifically for those with “erxtreme” autism, it will also serve as a prototype for other potential developers. By modeling how to effectively create affordable housing for special needs, we aim to inspire other developers and communities to work to meet the growing demand for such housing.

The building site at 131 Hokum Rock Road has already been secured through a 99 year lease of land owned by the Town of Dennis, with the value of this arrangement estimated at over \$500,000. We have also been awarded a \$500,000 grant from the Town of Dennis Community Preservation Committee, bringing the Dennis commitment to over \$1,000,000. Additional funding includes \$1,000,000.00 in state funding through a \$250,000 grant from the Massachusetts Housing Trust Fund, and \$750,000 from the Massachusetts Facilities Consolidation Fund. The Massachusetts Department of Developmental Services has qualified the project for low-income assistance and will process applicants and place qualifying residents. The Housing Assistance Corporation (HAC) has provided consulting and fundraising assistance and will continue to assist us during the final development and construction portion of the project. Once construction is complete, Cape Abilities will operate the facility and provide 24-hour onsite services for the residents, while FORWARD will continue to own and maintain the property.

**FORWARD at the Rock** is not part of a larger project, but we have an option with the Town of Dennis to build another 2 buildings with 4 bedrooms each. Once construction of the current project is further along we will work with the Department of Developmental Services and Cape Abilities to determine the need and likely timeline for the additional units. FORWARD also intends to investigate developing other regional affordable supportive housing projects in other towns.

### Specific Objectives of the Project:

1. Build eight new affordable housing units for adults (22 and up) with Autism who might otherwise be at risk for homelessness.

- Construct two buildings, each consisting of 4 single room occupancy living units, common kitchen, dining and living space, with a courtyard for shared socializing and recreation.
- Provide appropriate neighborhood-friendly landscaping, access and parking, and walking trails for use by residents, visitors and the public.

2. Provide eight Cape Cod adults with Autism with permanent life-long supportive living residences on the Cape.

- Place 8 adults with Autism selected and pre-approved by the state’s Department of Developmental Services in the residences.
- Provide 24/7 services delivered by Cape Abilities in accordance with each resident’s Individual Service Plan (ISP).
- Provide long-term maintenance of buildings and grounds.
- Provide oversight of the facility and service providers.

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

3. Help address the immediate regional need to provide more appropriate purpose-built affordable supportive housing for the growing and underserved population of adults with developmental disabilities in our community.

- Build according to standards for developmental disabilities, including attention to Safety, Acoustics, Spatial Sequencing, Escape Plans, Compartmentalization, Sensory Zoning, and Transitioning.
- Create a safe and supportive physical and social environment that ensures the well-being of the residents

**2. For Historic Preservation projects:** N/A

**3. CPA Goals/Criteria:** Describe how this project accomplishes the goals and objectives of the CPA (refer to the attached general and issue-specific criteria and identify which of these apply to the project).

*See detailed answers on page 8 below.*

**4. Community Benefits: What are the community benefits of the project?**

The project is regional, and benefits Brewster by addressing a need that impacts all of Cape Cod, including Brewster residents. At a cost pushing \$400,000 per bedroom, it is virtually impossible for any one town to undertake a project of this nature, which is why we are asking all the towns in the region to help fund the project.

**5. Community Support: What is the nature and level of support for this project? Include letters of support and any petitions.**

Community support for the project is very strong. The Town of Dennis has embraced the project, providing \$500,000 in CPC funding and 5 acres of Town owned land for the project, which was approved by a vote of 213 to 8 at Town Meeting. We have raised over \$200,000 in individual and local foundation donations, and we have dozens of actively involved volunteers. Our partners from across the Cape have been dedicated to helping ensure that the project is completed, and surrounding towns have supported our efforts, as exemplified by support from the Barnstable, Yarmouth and Chatham CPCs.

*See attached letters of support.*

**6. Timeline: What is the schedule for project implementation, including a timeline for all milestones? Please identify any special timing considerations for the project's implementation. If this is part of a larger project, is it phased? What is the timeline for the entire project?**

Summary:

July 10, 2019: Site work begins (clearing).



## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

July 12, 2019: Close loan agreement with the Commonwealth (Department Housing and Community Development) for \$1,000,000 (interest free, no repayment if terms are met).

July 12, 2019: Close loan agreement bridge financing and up to \$470,000 in permanent mortgage financing (25 year fixed at 5.5%) with BlueHub Capital (BCLF).

Mid-August, 2019: Foundation in.

Mid-August, 2019: Commence framing.

October 31, 2019: Framing complete, roof sheathed.

December, 2018: Rough plumbing/electrical commences.

December 31, 2019: Window and door installation complete.

February 11, 2019: Insulation installed.

February-May: Finish work.

June 1, 2020: Certificate of Occupancy

*NOTE: See detailed construction schedule in electronic document file.*

### **7. Credentials: What are the qualifications and relevant experience of those undertaking the project?**

**FORWARD** (Friends Or Relatives With Autism & Related Disabilities) is an independent 501(c) 3 nonprofit founded in 2014 by a group of concerned citizens whose common goal is to help meet the critical housing needs of adults with Autism and related disabilities. Because government owned housing is very limited and private-sector housing is cost prohibitive, both are unattainable for those most in need of affordable supportive housing. Access to housing has been a major and growing concern for the large population of adults with Autism, and with demand outstripping supply, the shortage has now reached critical proportions.

As part of our mission, FORWARD is committed to developing a small-scale regional housing community built, owned and managed by the nonprofit sector, with funding support from government, businesses, foundations and individuals. This project, **FORWARD at the Rock**, will provide new housing for eight Cape Cod residents eligible for state financial assistance for both rent and services, and will also demonstrate an approach to affordable housing that meets the needs of this underserved population.

Every board member of FORWARD has been touched by someone with autism. Several board members have children or other close relatives with Autism, but board members have a host of specific skills related to the project. One is a successful for-profit residential developer on Cape Cod, another built a Cape Cod nonprofit that builds affordable housing and assists people in need of housing, several are experienced social workers and others have experience in the public sector. All have deep roots in the community and are committed to the success of the project.

*See the attached Governance document for detailed bios and organizational details.*

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

### 8. Budget/Need for Public Funds:

**What is the total budget (sources of funds and uses/expenses) for the project and schedule for expenditure of CPA funds?**

*See Detailed Budget Attached.*

Construction Budget:	
Subtotal Structural	\$1,364,960
Subtotal Site Work	\$666,607
General Conditions	\$79,989
Construction Contingency	\$90,000
<Less Eliminated Items>	(\$204,400)
<b>Total Construction Hard Costs</b>	<b>\$1,998,556</b>
Total Soft Costs	\$488,244
Developer Fees, Overhead and Reserves	\$150,000
<b>Total Project Cost</b>	<b>\$2,635,400</b>
Committed Sources of Funds:	
Land	Town of Dennis
Dennis CPC	\$500,000
Yarmouth CPC	\$120,000
Chatham CPC	\$50,000
Barnstable CPC	\$250,000
FCF - State Funds	\$500,000
NHT - Federal Funds	\$500,000
BlueHub (Mortgage)	\$470,000
Private Fundraising	\$147,000
<b>TOTAL COMMITTED FUNDING</b>	<b>\$2,537,000</b>
<b>(GAP) / Surplus</b>	<b>(\$98,400)</b>

**All sources of funds and expenses must be clearly identified. Provide the basis for cost estimates whenever possible. (Note: CPA funds may not be used for maintenance.)**

All construction costs were determined through competitive bidding as mandated by the Department of Housing and Community Development. Costs and plans have been vetted through a state-appointed independent architecture firm. All CPA funds will go to pay for direct construction expenses.

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

*See Detailed Budget Attached.*

**If this is part of a larger project, what is the budget for the entire project (sources of funds and expenses/uses)?**

No, the information provided is the totality of the project.

**Clearly identify what additional funding sources are available, committed, or under consideration and why public funding would be appropriate. Include copies of commitment letters, if available, and describe any other attempts to secure funding for this project.**

In addition to the Brewster CPC, we are continuing to hold fundraisers and seek individual and foundation donors. However, early on in the fundraising process and after engaging a professional fundraising consultant, it became clear that an expense regional project such as FORWARD at the Rock could only succeed by focusing on receiving support from public sources such as the state's Department of Housing and Community Development and the Cape's municipal CPCs.

**Provide the most recent audited financial report or if none available, an applicant generated financial report that includes a balance sheet and operating budget. Town-sponsored projects must demonstrate why the project cannot be funded through the Department's or Committee's budget.**

We do not have audited financials, but we have attached a copy of our most recent 990 tax filing, prepared by Molloy & Co. CPA Inc, as well as our most recent financial statements and 5 years of Balance Sheets and Profit and Loss statements.

**9. Maintenance: If ongoing maintenance is required for your project, who will be responsible for maintenance and how will it be funded?**

FORWARD will Sublease the property to Cape Abilities. They will maintain the property, provide around-the-clock staffing for each house, and maintain the buildings and grounds. Cape Abilities maintenance responsibilities will include landscaping, snow plowing, regular servicing and inspections of all mechanical and safety systems, maintenance of and payment for all utilities.

See attached Sublease with Cape Abilities.

**10. Site Control and Appraisal: If the project involves acquisition of real property, provide evidence of site control (deed, purchase and sale, option, etc.). In addition, provide an appraisal of the property's value by a state licensed appraiser using customary appraising techniques. The CPA does not allow funding for acquisitions if the acquisition price is greater than appraised value.**

FORWARD is leasing land from the Town of Dennis under a 99-year Ground Lease (attached). FORWARD will build and own the houses and sublease them to Cape Abilities under a Sublease & Management Agreement with 5 successive 5-year terms (attached).

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

### CATEGORY SPECIFIC CRITERIA

(Identify which of the following criteria apply to your project.)

#### Community Housing Proposals

- **Increase the supply of year-round affordable rental housing for all types of households, such as young singles and couples, families, and seniors.**

FORWARD at the Rock creates 8 new units of affordable housing, increasing the supply for single adults who are 22 and older with “extreme” autism and related disabilities requiring around-the-clock care. Residents will be chosen by the Department of Developmental Services from their pool of Priority One clients, so it is difficult to predict the ages of the first residents.

Although the housing is intended to provide a permanent home for its residents, we do anticipate some turnover due to medical conditions, mortality, and other factors such as parents or other caregivers/guardians moving away from Cape Cod. For complex and not well-understood reasons, the typical lifespan of someone with autism is about 15 years shorter than that of the overall population, and even shorter for those with autism and a learning disability. Fortunately, research indicates that supportive housing and the type of quality care that will be provided at FORWARD at the Rock helps to lengthen that lifespan, but it does not entirely close the gap.

In addition to the direct benefit for the residents of the project, friends, caregivers and relatives also benefit by knowing their loved one is nearby and well cared for, and the entire Cape Cod community benefits by helping to care for those among us who are in greatest need of our help.

- **Build support for addressing housing needs through partnerships with conservation groups and nonprofit and for-profit developers.**

FORWARD is a nonprofit developer founded for the purpose of building new state-of-the-art housing for adults with autism and related disabilities. We have partnered with Cape Abilities, Housing Assistance Corporation, the Commonwealth’s Department of Developmental Services and Department of Housing and Community Development, as well as four Cape municipalities to date.

Partners include:

- A. Housing Assistance Corporation (HAC). HAC has provided fundraising assistance and consulting, and will provide development and construction consulting and oversight throughout the project.
- B. Cape Abilities. Cape Abilities, under contract with FORWARD, will provide around-the-clock customized services to the residents, including all services mandated by the Department of Developmental Services, as well as operate and maintain the homes. Cape Abilities staff are

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

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also advised on the building design, amenities, furnishing, safety and other aspects of the project.

- C. Town of Dennis. The Town is providing a 99-year lease of 5 acres of town owned land for the project at nominal cost (one dollar per year). It is estimated that this arrangement will save FORWARD well over \$500,000 in land acquisition costs. The Town of Dennis is also providing ongoing permitting, construction and legal assistance through its planning, legal and engineering departments.
- D. Town of Dennis CPC. By Town Meeting vote, Dennis has committed \$500,000 in funding for the project.
- E. Town of Barnstable CPC. By Town Council vote, Barnstable has committed \$250,000 in funding for the project.
- F. Town of Yarmouth CPC. By Town Meeting vote, Yarmouth has committed \$120,000 in funding for the project.
- G. Town of Chatham CPC. By Town Meeting vote, Chatham has committed \$50,000 in funding for the project.
- H. Project Manager, Gary Barber. Gary is Chair of the Dennis Town Building Committee and has been involved in many building projects including the Town's new Town Hall and the Police Station.
- I. Massachusetts Department of Developmental Services (DDS). DDS has committed to supporting the project. FORWARD has received confirmation from DDS that the project is eligible for state funding of resident services and rent, and DDS has certified that the project qualifies as affordable housing, with all residents expected to be at or below 30% of Brewster's AMI. DDS will also determine eligibility and select the residents.
- J. Massachusetts Department of Housing and Community Development (DHCD), and Community Economic Development Assistance Corporation (CEDAC): DHCD and CEDAC have provided guidance on the state funding process and advised on building design, the bidding process and related issues.
- K. BlueHub Capital (formerly Boston Community Capital). BlueHub, a nonprofit community financial development institution, has committed to providing bridge construction financing, and up to \$470,000 in permanent financing if needed.

▪ **Create housing that is affordable and appropriate for very low-income seniors and people with disabilities.**

Because FORWARD at the Rock is new construction, it has been designed for people with disabilities. It is a single story with no stairs and 100% ADA compliant. All spaces have been designed to meet the needs of special populations, with attention to sensory stimulus and other

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

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factors. Cape Abilities and the Department of Developmental Services (DDS) have been involved in all phases of the design process, including optimizing the location and interior view of the staff office. Cape Abilities and DDS will also collaborate to customize the furniture and décor for individual residents.

All units will be for those at 30% of area income. Because of the nature of their disability, this special population is unlikely to be gainfully employed, and most, probably all of their income will come from government assistance. FORWARD at the Rock is being designed and funded for those special members of our community who have “worst-case” housing affordability needs, and have “extreme” disability needs for supportive services.

### *The Need for Affordable and Supportive Housing:*

According to the June 2017 report: ***Supportive Housing Currently Available to People With Autism Spectrum Disorder in Massachusetts*** prepared for the *Housing Subcommittee of the Massachusetts Autism Commission Technical Assistance Collaborative*:

- There are at least 15,200 people with Autism Spectrum Disorders currently in need of supportive housing in Massachusetts. As a percentage of the state’s total population that equates to:
  - Cape Cod: 472;
  - Brewster 22
  - Dennis: 31
- According to Massachusetts Department of Education statistics for special education (which did not breakdown students by specific disabilities):
  - Brewster/Nauset: 317
  - Dennis and Yarmouth had 511 students with Individualized Education Programs in 2017
- Autism Speaks estimates 50,000 teens with autism become adults – and lose school-based autism services – each year.

Numerous studies, organizations and government reports indicate a critical shortage of affordable supportive housing for those with Autism. In the eleven-year period from 2005 to 2015, the number of 12 to 17 year-olds in Massachusetts receiving special education through an Individualized Education Plan (IEP) based on Autism increased three-fold and that growth is not anticipated to level off until 2030. The data indicates conclusively that we will see a significantly growing number of people aging out of special education services at age 22.

All of our residents will be in the Worst Case Needs cohort, many at less than 30% of Area Median Income. The shortage of affordable housing, particularly purpose-built supportive housing, coupled with an ever-increasing rate of autistic adults aging out of social service programs at age 22, and the aging general population on the Cape turns this housing shortage into a housing crisis. Courts have mandated that the developmentally disabled not be “warehoused”, thus expanding pressure on existing housing stock. Five years ago, the Massachusetts Autism Commission stated that housing capacity in existing programs is outstripped by demand, and we continue hearing that adults on Cape Cod who qualify for state



## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

---

support are being told that there is a shortage of beds on the Cape, and that they may be placed off-Cape, away from their community, familiar surroundings and support network.

- **Increase local capacity to plan, advocate for, and create affordable housing, preserve the affordability and condition of existing affordable units, and monitor affordable housing restrictions.**

We have designed our project to be a model for the planning, advocacy and creation of affordable housing for those with disabilities, and we aspire to build more housing that is both affordable and supportive.

By agreement with FORWARD and the Department of Housing and Community Development, Cape Abilities will monitor and certify the affordable restrictions.

- **Increase the variety of mixed-income housing choices in Brewster, particularly in or near commercial areas in order to support Brewster's economy and accommodate household growth.**

N/A.

- **Provide at least 10% of Brewster's year-round housing units as affordable housing in order to meet local and regional needs.**

Because FORWARD at the Rock is being built in Dennis, it does not add directly to Brewster's Subsidized Housing Inventory. However, it does help alleviate the need for Brewster to undertake such a project. FORWARD at the Rock does help meet regional needs, including Brewster, and the housing is open to all Cape Codders. No preference is given to residents of any particular towns.

- **Ensure long term affordability.**

Affordability is in perpetuity (99 years required by Ground Lease with Town of Dennis).

- **Give priority to local residents, town employees, employees of local businesses, and households with children in Brewster schools as allowed by law.**

Although there is no guarantee that a Brewster resident will be placed in FORWARD at the Rock, no other town - including Dennis - is guaranteed placement of residents. However, projects such as this do help to alleviate the overall Cape Cod shortage of affordable supportive housing. The Dennis, Barnstable, Yarmouth and Chatham CPC's have voted to help fund the project and multi-municipality support is vital to the success of regional housing projects such as this and Cape Cod Village. We know that the Brewster CPC has recognized the need for affordable supportive housing, and the value of supporting regional projects. In its January, 2017 Town of Brewster Housing Production Plan (HPP), Brewster identified "*Rental Housing for Single People*" as a priority housing need, stating:

*There are local and regional needs on Cape Cod for studio units and single-room occupancy (SRO) units for single people with low and extremely low incomes. Brewster has twelve units of group home housing for adults with severe disabilities, and some of the public housing units owned by the Brewster Housing Authority can be leased to people with disabilities who can live*

## APPLICATION FOR COMMUNITY PRESERVATION ACT FUNDING

FORWARD at the Rock. Brewster CPC Application, July 1, 2019

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*independently. However, there is limited rental housing appropriate for single people without disabilities. Populations served by very small, affordable units range from young citizens entering the workforce to divorced or separated individuals with limited means, very-low-income women who formerly qualified as displaced homemakers and are now living alone, and very-low-income seniors. Low-income one-person households have the second highest incidence of housing cost burdens in Brewster. DHCD made a similar finding about single, low-income renter households throughout the state in the most recent Five-Year Consolidated Plan.*

FORWARD at the Rock directly addresses that priority by adding 8 single-room occupancy units to the Cape's inventory of housing for single people with disabilities and extremely low income (less than 30% of area median income)

Although not limited to senior citizens, the project is for adults 22 years and up, and residency is open to any person qualified as needing affordable supportive housing.