FORWARD
Friends Or Relatives With Autism & Related Disabilities
Opening Hearts ♥ Building Homes

May 5, 2022

Jeff Treiber, Chair
Dennis Community Preservation Committee
Dennis Town Hall

Re: FORWARD at the Rock Phase II

Dear Jeff and Committee Members:

Thank you very much for the opportunity to apply for CPC capital funding for the construction of new affordable homes at **FORWARD at the Rock** on Hokum Rock Road. This new **Phase II** construction will create eight one-bedroom apartments for independent living to accommodate developmentally disabled adults who still need supportive services, health and safety supervision and access to 24-hour emergency response, but do not require a congregate setting with around-the-clock staffing. These eight new homes represent the fulfillment of our original commitment to the Town of Dennis to build a total of 16 special needs housing units at the Hokum Rock site.

These apartments will address the Town's critical need for affordable housing, and are responsive to the goals of the Community Preservation Committee, as well as the **Dennis Comprehensive Plan** and newly adopted **Dennis Housing Production Plan**. Further, the project adds 8 permanent units to the *Dennis Subsidized Housing Inventory*, and specifically addresses the need for extremely affordable housing for people with disabilities. The two group homes we opened in the fall of 2020 were quickly fully occupied and have now been operating as planned for a year and a half. The homes were opened on time and on budget, and we believe serve as a compelling example of a very successful municipal/nonprofit partnership.

Phase II has already received support from the Department of Developmental Services, which will select and support the residents, and with much of the needed infrastructure, including most of the driveway, already brought to the site, we believe we can expeditiously move this project to completion if we receive sufficient early funding.

Early support from the Dennis Select Board and Community Preservation Committee for the construction of Phase I of FORWARD at the Rock was crucial to the success of the project. Your early funding enabled us to the raise over two million dollars of additional project funding, and without your substantial early commitment, we believe the project would have taken much longer, and possibly would never have come to fruition.

PO Box 1174, South Dennis, MA 02660
www.go-forward.org
508-385-4663

Therefore, we respectfully request a grant of $685,000 from the Community Preservation Committee to help fund the direct hard and soft costs of Phase II construction. We are projecting the total cost of the project at just over $4.0 million, although we will certainly make every effort to reduce that number as we get closer to construction. Your support will be leveraged to raise federal, state and other local Cape CPC funding, and help secure a mortgage. It will also encourage donations from local individuals, businesses and foundations and demonstrate meaningful community support.

We very much hope you will continue our successful partnership and support our efforts to complete **FORWARD at the Rock**. Thank you again for this opportunity. We look forward to meeting with you and answering any questions you may have.

Sincerely yours,

Kathy Ohman

Kathy Ohman
President, FORWARD
ohmankathy@gmail.com

FORWARD CPC Application – FORWARD at the Rock Phase II

May 6, 2022

SYNOPSIS

1. Project Title

FORWARD at the Rock, Phase II

2. Organization Name

FORWARD (Friends Or Relatives With Autism & Related Disabilities, Inc.)

3. Amount Requested from CPA funds

$685,000.00 (Six Hundred and Eighty-Five Thousand Dollars)

4. Purpose

Community Housing

5. Project site(s)/location. As applicable, include tax map, parcel with site highlighted, acreage, and zoning district.

131 Hokum Rock Road, Dennis MA
201,109± square feet. Approx. 4.6 Acres.
Deed Book 1199, Page 386
Assessor Map 311, Lot 3
Town Owned Land, Zoning District GC-1
[See attachments for specific location information]

6. Synopsis of Project. This section is to be no more than one page in length and, if necessary, will be used by the CPC as a project description for public use (press releases, etc.).

FORWARD at the Rock Phase II will create new permanent housing for adults with special needs by building 8 one-bedroom affordable and supported apartments for Massachusetts Department of Developmental Services clients with autism and related disabilities. These homes are being designed specifically for residents who require appropriate affordable housing and services and supports, but are able to live more independently and do not require 24/7 staffing. All apartments will maximize the residents ability to live full lives while also receiving supportive services from the Department of Developmental Services.

The apartments are designed for aging-in-place, and will be built at ground level, fully accessible and barrier free, prepared for assistive technology, with a fire suppression system, power backup, and other health and safety amenities. Special attention will be given the sensory needs of the residents through design and construction, for instance through construction methods that attenuate sound transmission between apartments.

A central common area will encourage recreation, fitness and social interaction, and will provide areas for film screenings, games, exercise equipment and a kitchenette for shared meals and training for kitchen skills and nutrition. The common area will also include a small management office, bathroom, and indoor access to basement storage and utilities.

The project will be built on town-owned land leased to FORWARD for 99 years, and all units will be added to the Town's Subsidized Housing Inventory. This project addresses the dire need for affordable housing specifically designed for this special population.

APPLICANT INFORMATION

7. Project Title

FORWARD at the Rock Phase II

8. Organization Name

FORWARD (Friends Or Relatives With Autism & Related Disabilities, Inc.)

9. Address (street and post office box), Telephone, Fax, E-mail, Website

FORWARD
PO Box 1174,
S. Dennis, MA 02660

508-385-4663, info@go-forward.org, www.go-forward.org

10. Federal Tax Identification Number

FORWARD: 464669648; (ROCK Phase II LLC: 372043089)

11. Primary Contact Person(s) & Secondary Person (titles, telephone numbers, and e-mail addresses)

David Kaplan, Executive Director, 508-397-6924, dkaplan@go-forward.org
Kathy Ohman, President, 508-280-5426, kathyo@go-forward.org

12. Primary Contact Person & Secondary Person who can approve and receive the funds (titles, telephone numbers, and e-mail addresses)

David Kaplan, Executive Director, 508-397-6924
Heather Brown, Treasurer, 774-722-0936, hbrown@capecodfive.com

APPLICANT BACKGROUND

12. Brief applicant history

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 was to help meet the critical housing needs of adults with Autism and related disabilities. Because new 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 crisis proportions.

Over two-thirds of adults with autism are living with their parents or other close relations who themselves may be aging and are not able to provide adequate care. The situation is then compounded because most adults on the Autism Spectrum are unable to maintain incomes high enough to secure their own housing or pay for needed services. Often isolated and living in inappropriate and unhealthy environments, FORWARD realized that this population deserved a new approach to housing.

Motivated by that knowledge, the organization responded to an RFP issued by the Town of Dennis for construction of 4 group homes at 131 Hokum Rock Road, and on May 8, 2015 applied to the Dennis CPC for $500,000, which was subsequently approved by the Committee. The CPC grant gained final approval at Town Meeting on October 27, 2015, and the project was officially awarded to FORWARD on January 20, 2016.

FORWARD spent the next several years working on fundraising, permitting, design, engineering and the other myriad of tasks required to start construction. By virtue of a dedicated board of directors, the commitment of the Town and Dennis community, development partners, and funding from the state and 6 local CPCs, construction commenced in July 2019, and a Certificate of Use & Occupancy on June 9, 2020.

See #14. Summary of comparable projects completed below for more details.

13. Names of governing board, trustees or directors

Kathy Ohman (President)
Bob Samoluk (Vice President)
Heather Brown (Treasurer)
Mark Ameres
Robert Duffy
Sheila Lyons
Paul McCormick
Nancy McHugh
Maura Morahan
Ann Phalen
Rick Presbrey
Rose Marie Stripolli

14. Summary of comparable projects completed

FORWARD at the Rock Phase I, two new group homes, each with 4 residents, at 131 Hokum Rock Road, Dennis. Constructed between July 11, 2019-June 9, 2020 (Certificate of Use and Occupancy).

Designed for adults with profound developmental disabilities, each home is staffed 24 hours a day by Cape Abilities, a nonprofit disabilities service provider. Residents are selected by the MA Department of Developmental Services, which is also responsible for their housing, services and support.

The $2.7 million project was built on-time and on-budget, and has operated as designed, with positive cash flow and capital reserves. The project was built on land owned by the Town of Dennis and leased to FORWARD for 99 years.

PHASE II will be built on the same 4.6 acre parcel, and the needed infrastructure has already been brought to the site, and the original project permitting anticipated an additional 8 units. PHASE II will now create those additional 8 homes.

FORWARD is a 501 (c) 3 nonprofit, organized specifically to build this type of specialized housing. The organization is managed by a 12-person board with a committee structure comprised of community members with construction, disability services, management, and other diverse backgrounds, and also includes two parents of adult children with autism. Staff consists of an Executive Director, and other functions and services are outsourced to our architect, engineer, development consultant, accountant, CPA and others as needed. We have received a clean audit review for our most recent fiscal year, July 1, 2020-June 30, 2021, and we have sufficient reserves to ensure continued operation throughout the building process. We anticipate that with PHASE II, as with PHASE I, we will once again have rigorous oversight of all aspects of the project from the Town of Dennis, the Department of Developmental Services, Department of Housing and Community Development, and our other funders.

PROJECT INFORMATION

15. Project Concept

FORWARD at the Rock Phase II is an affordable housing development which will consist of 8 one-bedroom apartments for adults with Autism and related disabilities. All apartments are being designed specifically for this vulnerable population, and all will be fully accessible and barrier free, adaptable for assistive technology, and customized for supported independent living.

All residents will be clients of the Commonwealth's Department of Development Services (DDS) and DDS will select and place the residents. FORWARD, a nonprofit organization acting as the project developer, will build the apartments for the DDS clients. The residents will be those with disabilities who can live more independently, and who do not require 24/7 staffing care, but still need supports, services, and help with health and safety.

As is well known, the need for affordable housing is urgent and the need for affordable disability housing is critical. We have attached results from a study we commissioned through funding from the Barnstable County Economic Development Committee to evaluate Cape housing needs for those with developmental disabilities, and in recent meetings with Cape Abilities and the Department of Developmental Services we've learned that the need for this specialized housing continues to worsen.

In 2020, FORWARD completed FORWARD at the Rock Phase I, which consists of two group homes for congregant care of adults with profound developmental disabilities. Each home serves four clients of the Massachusetts Department of Developmental Services, and each home is staffed around-the-clock by

Cape Abilities, a Cape Cod Disabilities Service Provider. The homes were built on-time and on-budget, and both have been continuously fully occupied since the residents first arrived. The success of Phase I has demonstrated how a public-private partnerships can successfully produce new affordable housing on a timely basis, even complex housing for special populations.

Phase II will be located adjacent to the existing Phase I homes on 4.6 acres of town-owned land which is leased to FORWARD for 99 years with rent of one dollar per year. FORWARD owns the structures and other improvements and is responsible for ensuring that they are maintained for their intended use and remain affordable in perpetuity.

Phase II apartments will be built at ground level for easy access, and each will have direct exterior entry. All units will be wheelchair accessible, including roll-in showers and kitchens designed for easy access, with ceilings designed to accommodate hoists when needed. Apartments will be in two wings of 4 apartments each, with each apartment approximately 575± square feet (see attached floor plan) for a total of 4,616± square feet. Connecting the two wings will be a 1,275± square foot common area for recreation and small social gatherings, games, movie screenings, training and meetings. A full walkout basement under the common area will provide secure storage for residents and property management. Disruption of the residential neighborhood of single-family homes will be mitigated by anticipated building placement, building design, and landscaping. The common area will have a full walkout basement for utilities and resident storage, with crawl spaces under the residential wings of the building.

Project Cost: $4,242,123.

Project Highlights:
- Configured as 8 individual one-bedroom apartments
- Purpose-designed to accommodate the needs of those with autism and related disabilities
- Built on Town-owned land already secured under a 99-year lease between FORWARD and the Town of Dennis
- Utilities already brought to site
- Project team of architect, construction consultant, engineer, and attorney have been assembled
- Town Approval, and Massachusetts Department of Developmental Disabilities project support has been secured
- Apartments prepared for intensive use of Assistive Technology and remote staffing
- The site and building placement is designed to minimize any visual impact on the local neighborhood. Please note that FORWARD encountered very minimal neighborhood concerns in the development of Phase I, and does not anticipate any neighborhood objections to Phase II
- The building will include a flexible common space for resident recreational and social use, training, telemedicine, Zoom, additional storage and a small office
- The project will include lessons learned from impacts of Covid – on-site recreation, storage, zoom, back-up utilities

• All spaces will be ADA compliant, built to allow for aging-in-place
• All spaces will be highly energy efficient and sustainable. Every apartment will have its own electric split system heat pump for heating and cooling, and on-demand hot water unit

Project Benefits:
• Addresses the region's critical need for affordable housing
• Responds to the recently updated Dennis Housing Production Plan and the Cape Cod Regional Policy Plan
• Creates new homes for adults with developmental disabilities
• Adds 8 permanent units to the Town of Dennis Dennis Subsidized Housing Inventory
• Benefits from FORWARD's success in building Phase I on-time and on-budget
• Leverages existing partnerships, organizational expertise and experience

Project Timeline:
- Land secured – Complete
- Selectboard Approval – Complete
- MA Department of Developmental Services Support – Complete
- Local Site Permitting – August 1, 2022
- Construction Contractor Bids Out – November 1, 2022
- Final Capital Funding Applications Submitted (OneStop) – November 30, 2022
- Construction Commences – March 1, 2023
- Final Capital Funding and Mortgage Closing – April 1, 2023
- Construction Complete – March 1, 2024
- Certificate of Occupancy – April 1, 2024
- Fully Occupied – June 1, 2024

16. Project Goals / Objectives

A. Provides safe and supportive homes for 8 people on the autism spectrum in need of extremely affordable housing
B. Fulfills FORWARD's commitment to the Town of Dennis to build 16 bedroom units at 131 Hockum Rock Road
C. Adds 8 housing units to the Dennis Subsidized Housing Inventory
D. Demonstrates that Public/Nonprofit partnerships can work effectively to create new housing
E. Positions FORWARD to further develop as an organization so it can continue to thrive and build even more specialized affordable housing in Dennis

17. Describe any legal issues, ramifications, impediments about this project, if any.

We don't anticipate any non-routine impediments to the project. However, it will require:

- A very simple amendment to the existing Ground Lease with the Town of Dennis. (Note that the change approved unanimously by the Board of Selectmen on October 19, 2021).

- Planning Board approval. (Note that Phase I planning board approval anticipated these 8 units).
- Old Kings Highway Committee approval. (Note that we anticipate minimal visibility from Hokum Rock Road, and we will be planting and maintaining wide a vegetated buffer).
- The routine issuance of building permit and final approval for occupancy.

The project will require major capital funding, but we are confident that given our experience with Phase I, and with the help of the Town of Dennis, our project partners, and our community, we will be able to raise the needed money over the next 12 to 18 months.

There is, of course, a lot of hard work yet to be done, but because the infrastructure is already at the site, the site has already received an environmental assessment, we already have a lease for the land, have only one residential abutter and have solid relations with vendors, funders and the community, we anticipate that this project will not encounter the issues that sometimes plague construction of other affordable housing projects.

18. Describe how this project accomplishes the goals and objectives of the CPA

The project squarely addresses one of the primary goals of the CPA – the creation of community housing. Specifically:

COMMUNITY HOUSING Reuses existing buildings; involves construction of new buildings on a previously developed site; maintains character of existing neighborhoods; increases number of units in affordable housing inventory; promotes/maintains diversity in housing stock.

"The Community Preservation Committee shall make recommendations to the Town Meeting for the creation, preservation and support of community housing"-- CPA

<u>This project creates 8 units of housing which</u>:

- Could not be built without CPA funding
- Will be Extremely Affordable (≤ 30% of Area Median Income)
- Will add all 8 units to the Dennis Subsidized Housing Inventory
- Will serve a special population in critical need of decent fully accessible housing
- Will promote diversity in housing stock

19. Describe how this project is relevant to the current and future needs of Dennis

This project is responsive to the goals and objectives of the recently adopted Dennis Housing Production Plan.

FORWARD could not agree more with the plan's statement, "Dennis is facing a housing crisis". Phase II directly addresses many of the plan's Goals & Strategies, including the first three:

1. ***"Identify suitable publicly and privately-owned sites*** *for facilitating affordable housing production."*

Phase II is being built on 4.6 acres of Town-owned already leased to FORWARD for 99 years at $1.00 (one dollar) per year. Note that rent has been paid in full.

2. ***"Meet housing needs for older residents and residents with disabilities****. Dennis's population is older on average than most Massachusetts communities and reports a higher rate of disability. These populations may have greater affordable housing needs than others."*

Phase II is exclusively for residents with disabilities, many of whom are also older. The project anticipates the physical and developmental needs of the residents and is designed to facilitate residents aging-in-place.

3. ***"Provide more rental options in all areas of Town****. Dennis has a lower proportion of rental units than the state or county, and lack of choice in this regard may impact smaller households, less wealthy households, and older households, all of which Dennis has a high proportion of."*

Phase II provides 8 rental units, which we anticipate will all be restricted to being Extremely Affordable at $\leq$ 30% of Adjusted Area Median Income, with rent paid by residents in the maximum range of $550.00-$600.00 per month, or possibly lower depending upon resident income, DDS regulations and other factors.

Regarding residents with disabilities, Plan goes on to state:

> *"2,490 Dennis residents (17.8% of the population) report having one or more disabilities, a higher rate than the County (13.2%) and the State (11.6%).7 People with disabilities may need special housing accommodations, and median income for Dennis residents with disabilities is about 20% lower than individuals who do not have a disability. Given these statistics, the issue of affordable housing in Dennis cannot be separated from the issue of disability rights."*

FORWARD at the Rock Phase II is relevant to the current and future needs of Dennis. The need for additional units of extremely affordable housing, especially for those with disabilities, is obvious and dire.

20. Describe how this project relates to the Dennis Local Comprehensive Plan

The project squarely fits the Dennis Local Comprehensive Plan. While the plan has not been updated in some time, the statement in the first paragraph of the Affordable Housing section (page 293) is still true today:

"A basic tenet of our society is that everyone deserves to live in clean, safe, affordable housing. However, all-to-often due to the cost of housing, many people are not able to live in such housing. These people find themselves living in over-crowded, or otherwise unsafe living arrangements. Safe/Affordable housing: the term implies the ability to bear the cost of housing without serious detriment; implies a relationship between cost and income; sales price or rental costs within the means of low-or moderate-income households that does not involve living in overcrowded or otherwise unsafe arrangements."

The plan lays out in depth the need for production of affordable housing, and the factors contributing to that need. Unfortunately, in the years since the report, the need has only grown worse, with the gap between housing affordability and family income continuing to grow. Albeit just a small piece of what's needed, FORWARD at the Rock Phase II will help to narrow that gap.

PROJECT IMPLEMENTATION & BUDGET

21. Total CPA Funding Request

$685,000.00

22. A Financial Plan, which must include a line item project budget

[See attached for a comprehensive budget of costs and funding sources.]

Cost Summary*	Amount	Comments and/or Details
Acquisition		99 Year Ground Lease With Town of Dennis, MA, @$1.00/yr
Soft Costs, Design, Permitting/Planning	$426,250.00	Planning grant secured, pre-permitted for 8 bedrooms
Construction/Renovation	$2,706,826.00	Awaiting Funding Commitments
Site Work	$558,750.00	Awaiting Funding Commitments
Other	$550,297.00	Reserves, Contingencies, Overhead and Fees
Total Cost	$4,242,123.00	

*These numbers were developed from pricing of current HAC projects, cost experience from Phase I, increased cost due to ADA requirements, fire sprinkling, generator and other considerations.

23. Evidence of interest from potential lenders, if applicable

Preliminary discussions with BlueHub (our current Phase I lender), and Mass Development.

Ongoing discussions with the Department of Housing and Community Development ($500,000 Phase I no-interest forgivable loan) and the Community Economic Development Assistance Corporation ($500,000 Phase I no-interest forgivable loan).

$750,000 Congressionally Directed Spending Request submitted to Congressman Keating

$1,000,000 Congressionally Directed Spending Request submitted to Senators Warren and Markey

Application will be submitted to other CPCs in the Fall for Spring Town Meetings

[See full list below.]

24. List of other funding source(s), include private/public/in-kind

[See attached budget for additional details.]

Funding Summary	Amount	Comments and/or Details
Federal Funding		
Congressionally Spending Request - Keating	$750,000.00	Submitted April 22, 2022
Congressionally Spending Request - Warren/Markey	$1,000,000.00	Submitted April 27, 2022
State Government Funding		
MA Dept. of Housing & Community Development	$500,000.00	Mass OneStop being prepared
MA Community Economic Development Assistance Corp.	$500,000.00	Mass OneStop being prepared
Local Government Funding		
Dennis Municipal Affordable Trust	$65,000.00	For Pre-Development Costs
Dennis Community Preservation Act Funds	$685,000.00	May 6, 2022 Submission
Other CPCs	$400,000.00	Applications Due Fall, 2022
Private or Nonprofit Funding		
Owner Equity (FORWARD)	$200,000.00	Community Fundraising
Owner Deferred Overhead and Profit Fees (FORWARD)		Owner will forgo fees if needed to close on financing or to complete the project
Mortgage (nonprofit community development financial institution)	$657.00	To be determined based on subsidy programs. We anticipate a $300,000-$500,000 mortgage
Total Funding	$4,100,657.00	Anticipate mortgage to cover funding gap

25. A five-year income and expenses plan for this project, if applicable

[See attached budget for additional details. Mortgage Expense assumes $400,000 mortgage.]

	Year 1	Year 2	Year 3	Year 4	Year 5
Operating Income	**$137,088.00**	**$142,571.52**	**$148,274.38**	**$154,205.36**	**$160,373.57**
Total Expenses	$90,450.46	$94,068.48	$97,831.22	$100,766.15	$103,789.14
Cash Flow	$46,637.54	$48,503.04	$50,443.16	$53,439.20	$56,584.43
Mortgage Expense	$34,700.00	$34,700.00	$34,700.00	$34,700.00	$34,700.00
Net Cash Flow	**$11,937.54**	**$13,803.04**	**$15,743.16**	**$18,739.20**	**$21,884.43**

SUPPORT DOCUMENTS

26. Letters of support from community organizations or other such sources (no more than five)

See document package.

1. Cape Abilities
2. Housing Assistance Corporation
3. Parent with adult child living in Phase I House
4. Parent with adult child living in Phase I House
5. Parent with adult child living at home

27. References (no more than three)

See document package.

1. MA Department of Developmental Services
2. Dennis Select Board

28. Other relevant materials specific to the project

1. Schematic Design Conceptual Plans
2. Project Pro Forma Budget
3. Project 5 Year Operating Pro Forma Budget
4. Housing Needs Study commissioned by FORWARD through a grant from the Barnstable County Economic Development Council
5. Location Information: Select Board Approval, Tax Card, Zoning Map, Surveys, Aerials

29. Copy of most recent US Income Tax Form 990, where appropriate

See attached 990 and Audit Review.

30. Certificate of Non-Collusion (provided herein)

See attached.

APPLICATION SUBMITTED BY:

Name of Organization: FORWARD

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

Phone Number: 508-397-6924

Email: dKaplan@gmail.com

Chief Executive Officer: David Kaplan

Signature: DK

Name: (if more than one) ____________________

Signature: ____________________

FORWARD
Friends Or Relatives With Autism & Related Disabilities
Opening Hearts ♥ Building Homes

May 6, 2022

TO: Dennis CPC

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this proposal 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, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Chief Executive Officer(s):

Kathy Ohman

Name (print)

Kathy Ohman

Signature

President

Title

May 6, 2022

Date

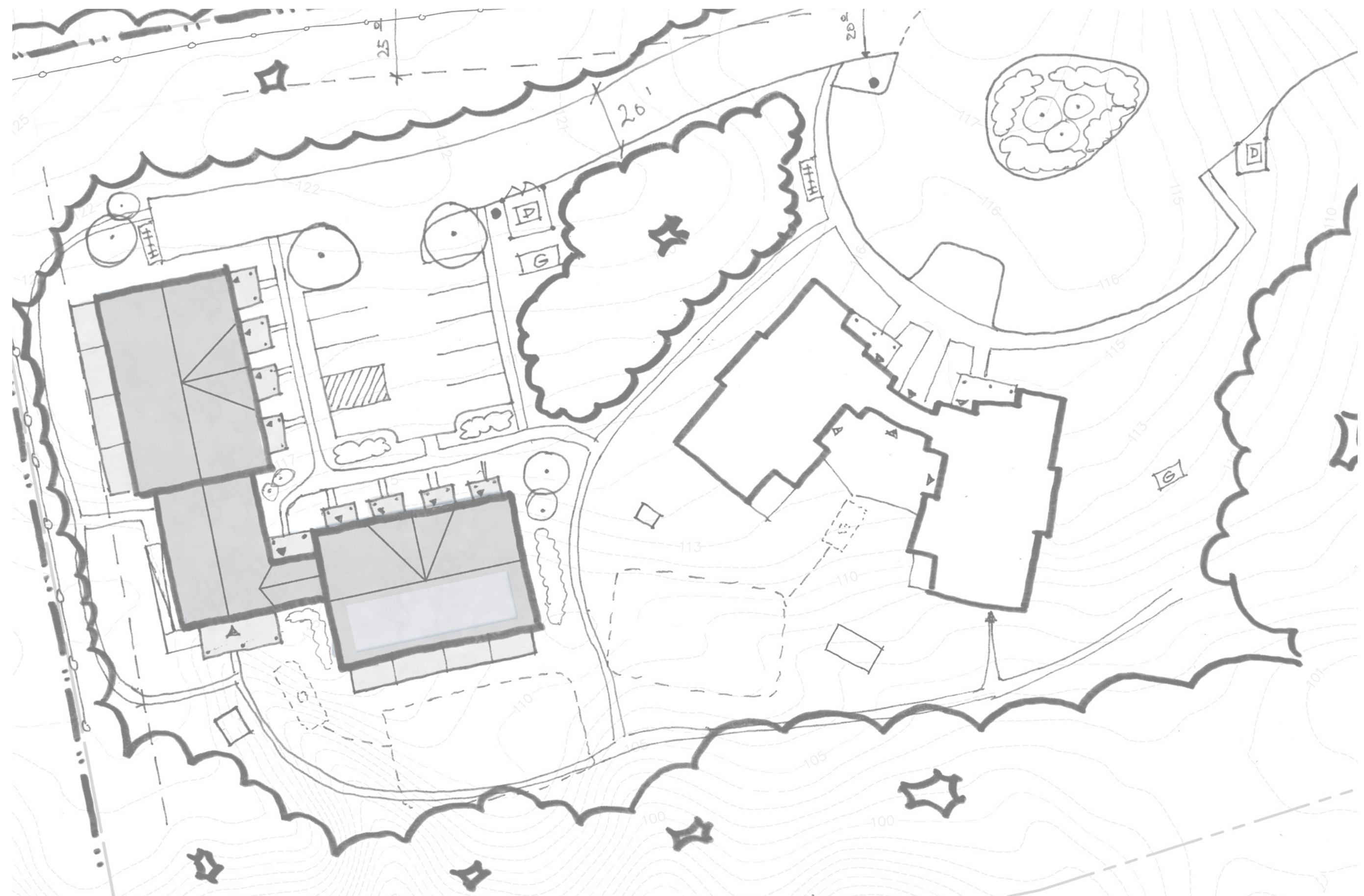
PO Box 1174, South Dennis, MA 02660
www.go-forward.org
508-385-4663

FORWARD AT THE ROCK - PHASE II

SCHEMATIC DESIGN

DENNIS, MA

MAY 19, 2022

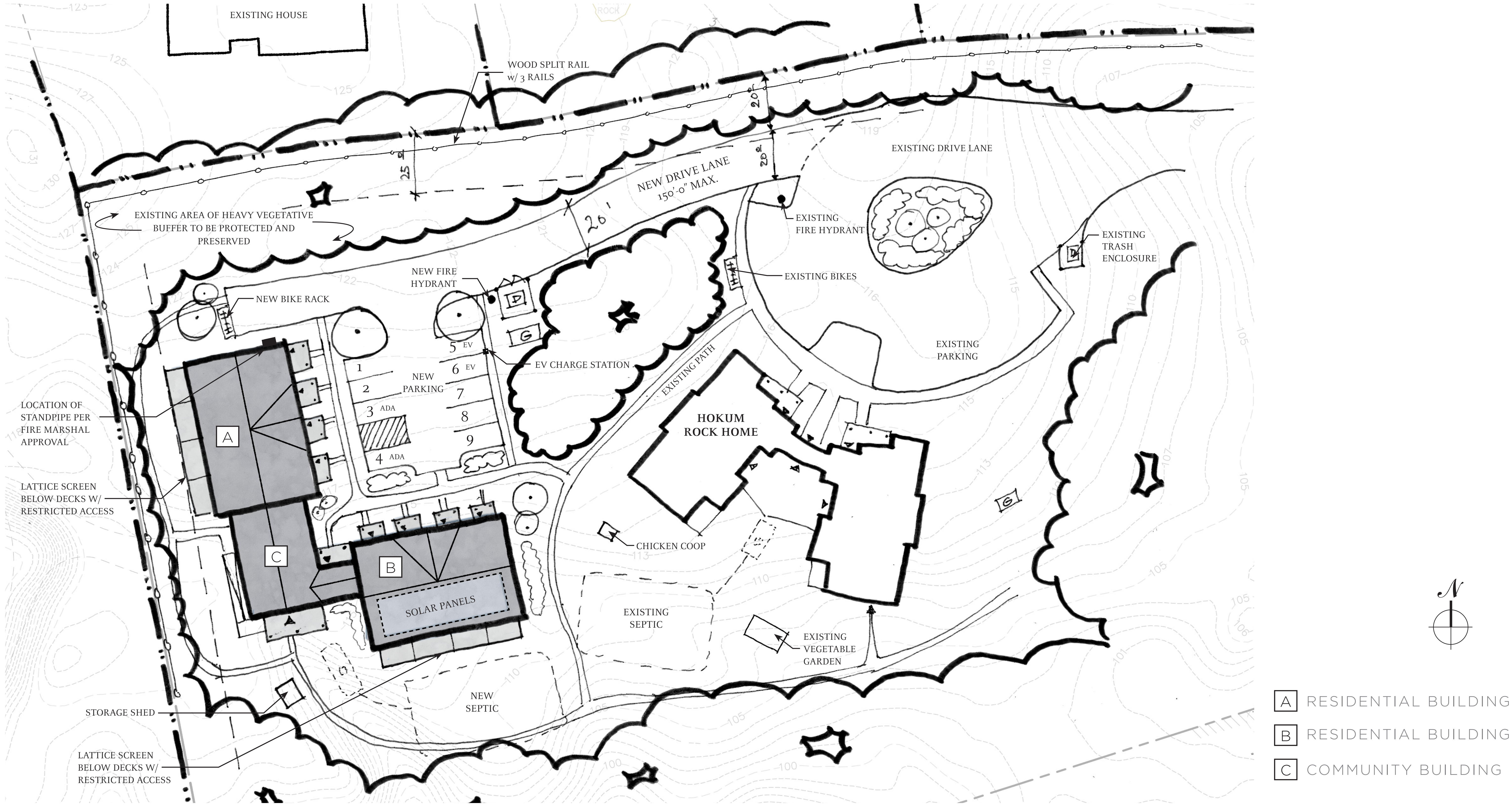


Horsley Witten Group
Sustainable Environmental Solutions

Housing Assistance Corporation
Cape Cod

Friends Or Relatives With Autism & Related Disabilities

UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN



FORWARD AT THE ROCK - PHASE II

SITE PLAN

MAY 19, 2022

SCALE: 1"=40'-0"

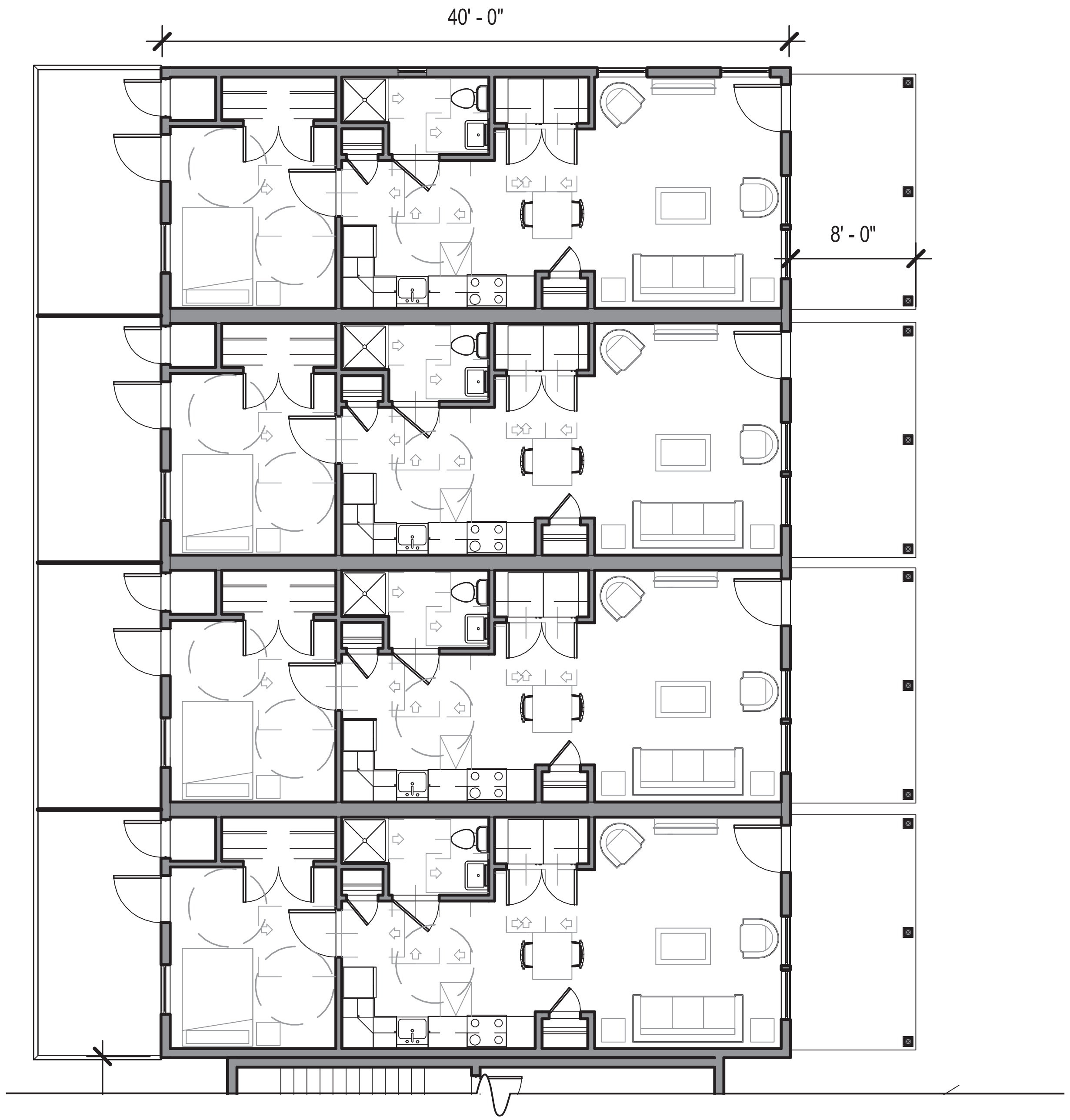
0 20' 40' 60' 80' 100'

Horsley Witten Group Sustainable Environmental Solutions

Housing Assistance Corporation Cape Cod

Friends Or Relatives With Autism & Related Disabilities

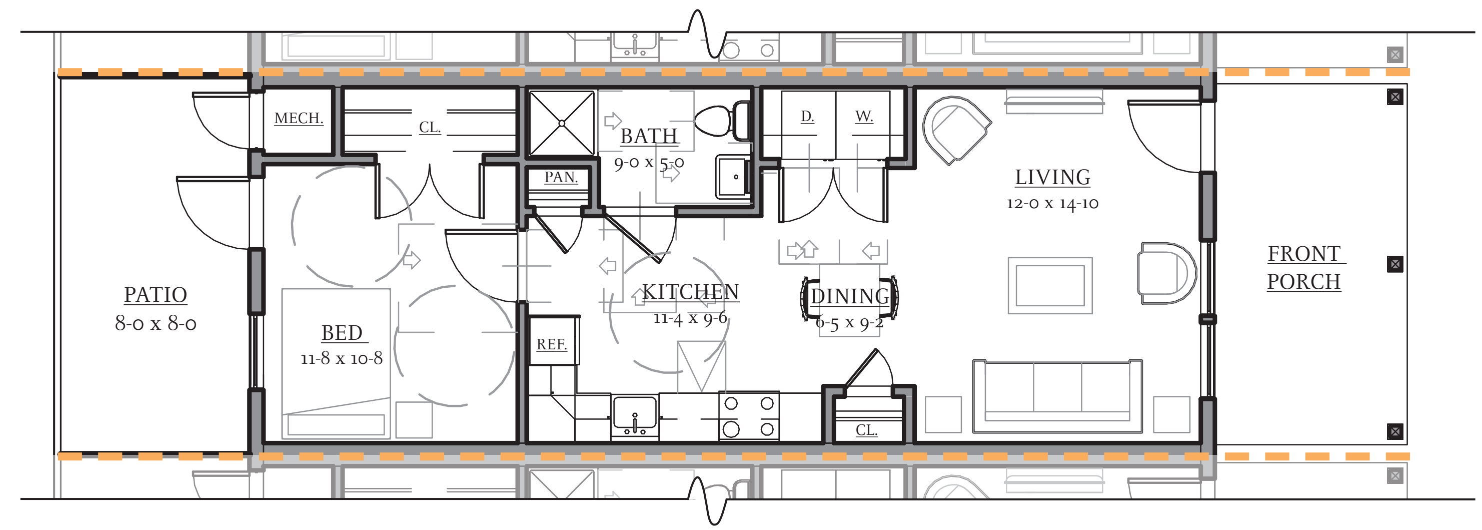
UNION STUDIO ARCHITECTURE & COMMUNITY DESIGN



PARTIAL FLOOR PLAN

SCALE: 3/32"=1'-0"

0 1' 2' 4' 10' 20' 40'



TYPICAL RESIDENTIAL UNIT

SCALE: 3/16"=1'-0"

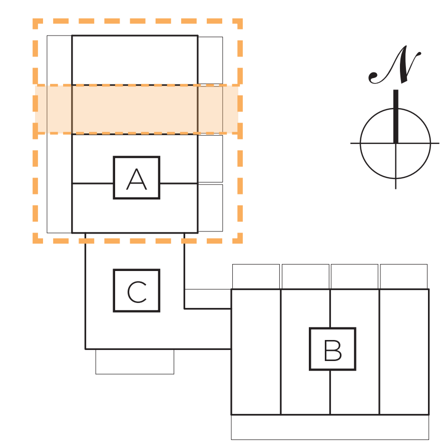
0 1' 2' 5' 10' 20'

SQUARE FOOTAGE TOTALS

Total Heated Gross - 6,440 sf

Total Heated Net - 5,891 sf
Residential - 4,616 sf (net)
Common Area - 1,275 sf (net)

Total Unheated - 1,275 sf
Basement - 1,275 sf (net)



KEY PLAN

FORWARD AT THE ROCK - PHASE II

PARTIAL FLOOR PLANS

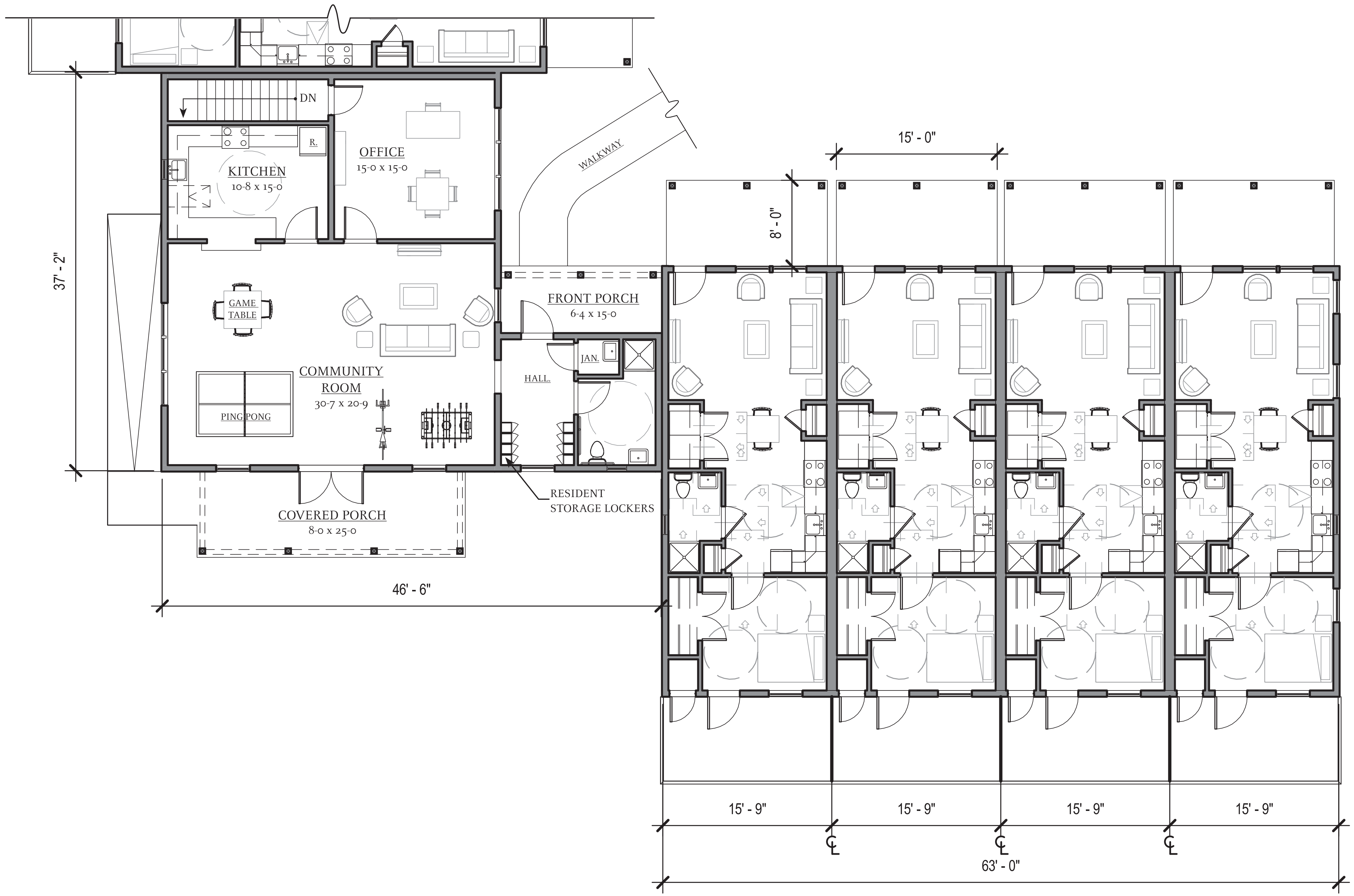
MAY 19, 2022

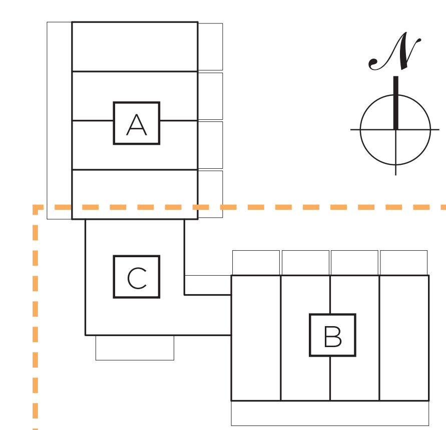
Horsley Witten Group
Sustainable Environmental Solutions

Housing Assistance Corporation
Cape Cod

Friends Or Relatives With Autism & Related Disabilities

UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN





KEY PLAN

FORWARD AT THE ROCK - PHASE II

PARTIAL FLOOR PLANS

MAY 19, 2022

SCALE: 3/32"=1'-0"

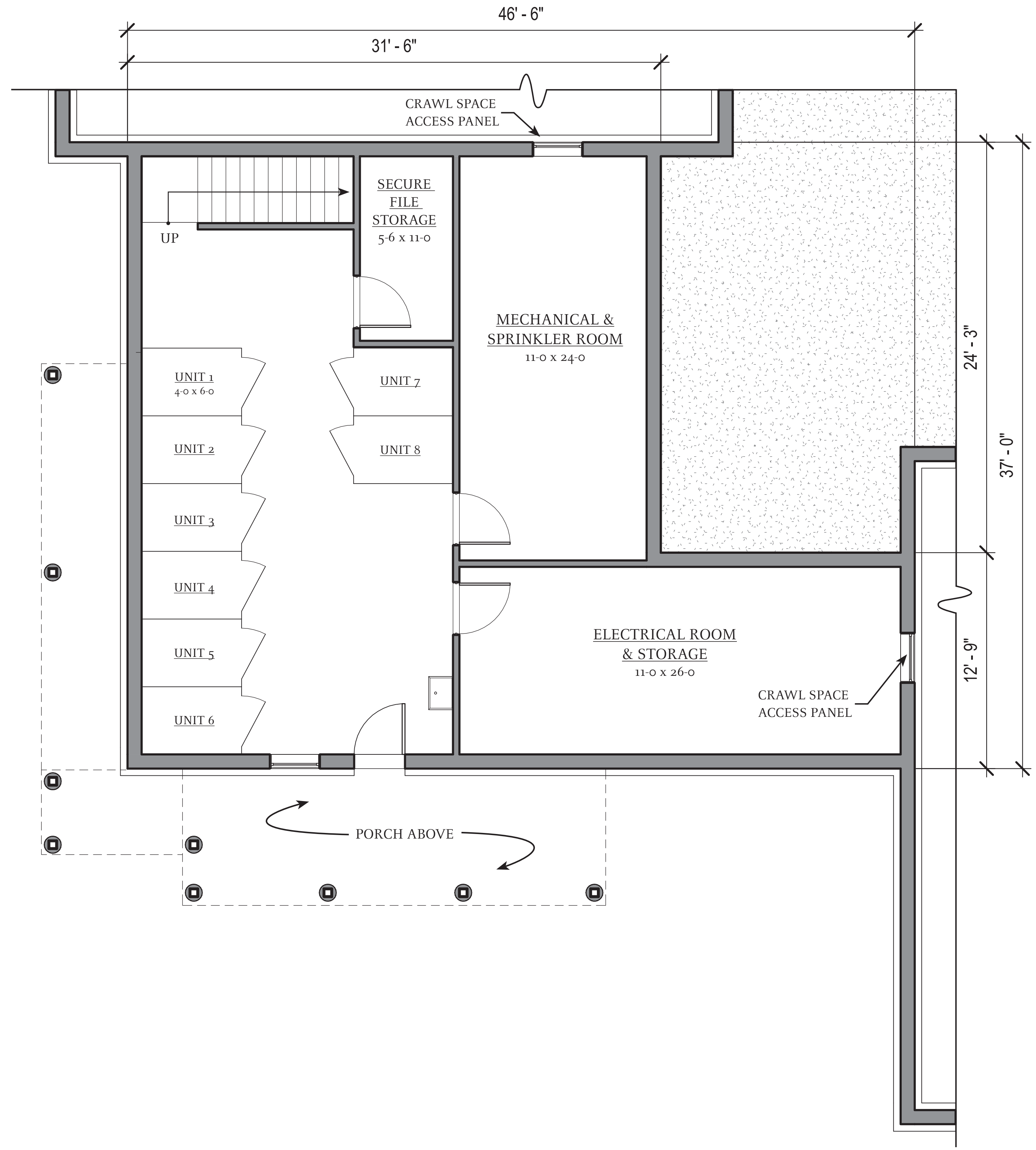
0 1' 2' 4' 10' 20' 40'

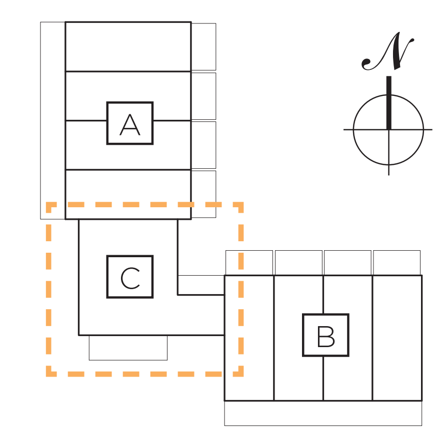
Horsley Witten Group
Sustainable Environmental Solutions

Housing Assistance Corporation
Cape Cod

Friends Or Relatives With Autism & Related Disabilities

UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN





KEY PLAN

FORWARD AT THE ROCK - PHASE II

BASEMENT PLAN

MAY 19, 2022

SCALE: 1/8"=1'-0"

0 1' 2' 4' 8' 16' 32'

Horsley Witten Group
Sustainable Environmental Solutions

Housing Assistance Corporation Cape Cod

Friends Or Relatives With Autism & Related Disabilities

UNION STUDIO
ARCHITECTURE & COMMUNITY DESIGN

Property Summary Proforma - FORWARD at the Rock, Phase II

MAX REVENUE POTENTIAL	Monthly per Unit			Monthly	Annual
Number of Units	4	4	-	8	8
Area Median Income (AMI)	50%	30%	Market		
Average Monthly Rent per Unit	$ 839	$ 450	$ 1,142	$ 644	$ 7,730
Total Rental Income	$ 3,354	$ 1,799	$ -	$ 5,153	$ 61,836
Other Monthly Income (laundry, vending, parking, etc.)	1BR	1BR	1BR	$ -	$ -
POTENTIAL GROSS INCOME				**$ 5,153**	**$ 61,836**

MAXIMUM SUPPORTABLE LOAN AMOUNT		
Potential Gross Income (PGI)	$ 61,836	From above
Vacancy Rate	5%	Input
Vanancy Loss (V)	$ (3,092)	PGI * V%
Effective Gross Income (EGI)	$ 58,744	PGI - V
Annual Operating Expenses (Op Ex)	$ (58,696)	Input
Net Operating Income (NOI)	$ 49	EGI - Op Ex
Debt Service Ratio (DSR)	1.15	From lender
Funds Available for Debt Service (FADS)	$ 42	NOI * DSR
Interest Rate	5.0%	From lender
Amortization Term - Years	30	From lender
Annual Constant (AC)	0.0642	From table
Maxium Supportable Loan Amount	**$ 657**	FADS/AC
Cash Flow Before Taxes		$ 6.33

SOURCES OF FUNDS	
Loan	$ 657
Owner Equity	$ 200,000
Town of Dennis CPC & DMAHT	$ 750,000
MA Comm Econ Devel (CEDAC)	$ 500,000
MA Dept. of Housing (DHCD)	$ 500,000
Other Town CPCs	$ 400,000
Congessional - House	$ 750,000
Congressional - Senate	$ 1,000,000
TOTAL	**$ 4,100,657**

	Project (Surplus) / Gap	Per Unit
	$ 141,466	**$ 17,683**

ESTIMATED COST (see Development Cost Tab for Inputs)	Project Total	Per Unit
Soft Costs	$ 405,952	$ 50,744
Soft Cost Contingency	$ 20,298	$ 2,537
Construction Costs	$ 2,968,706	$ 371,088
Constuction Contingency	$ 296,871	$ 37,109
Developer Fees / OH	$ 500,297	$ 62,537
Reserves	$ 50,000	$ 6,250
Total Development Cost (TDC)	**$ 4,242,123**	**$ 530,265**

FINANCIALS		
Net Rental Revenue		$ 58,744
Operating Expenses		$ (58,696)
Depreciation	40	$ (105,546)
Mortgage Interest		$ (33)
Net Revenue		**$ (105,530)**
Principal		$ (10)
Cashflow		**$ 6**
Debt Service Ratio (DSR)		**(1.14)**

Construction Cost Pro Forma, May 6, 2020

Construction Costs	Current Budget	% of Hard	Notes
Concrete	$ 201,250.00	7%	
Masonry	$ -	0%	
Metals	$ -	0%	
Rough Carpentry	$ 243,900.67	8%	
Waterproofing	$ -	0%	
Finish Carpentry	$ 139,645.88	5%	
Insulation	$ 37,621.03	1%	
Roofing	$ 62,500.00	2%	
Sheet Metal and Flashing	$ 18,750.00	1%	
Exterior Siding	$ 56,250.00	2%	
Doors	$ -	0%	
Windows	$ 133,947.11	5%	includes windows
Glass (Glazing & Storefront)	$ -	0%	
Drywall Gypsum Board Systems	$ 44,050.80	1%	
Tile Work	$ 37,099.56	1%	
Acoustical	$ -	0%	
Wood Flooring	$ -	0%	
Resilient Flooring	$ 42,786.28	1%	
Carpet	$ -	0%	
Paint & Decorating	$ 56,015.63	2%	
Specialties	$ -	0%	
Cabinets	$ 102,758.86	3%	
Special Equipment	$ 12,792.91	0%	
Appliances	$ 20,212.47	1%	
Blinds	$ -	0%	
Special Construction	$ 54,305.05	2%	generator
Elevator or Conveying system	$ -	0%	
Plumbing & Hot Water	$ 141,458.94	5%	

Acquisition Costs	Budget		Notes
Acquisition: Land	$ -		
Acquisition: Building	$ -		
Total Acquisition	$ -		

Soft Costs	Budget	% of Soft	Notes
Architecture and Engineering	$ 200,000.00	49%	
Survey and Permits	$ 20,000.00	5%	
Clerk of the Works		0%	
Environmental Engineer	$ 4,500.00	1%	21e Phase 1
FF&E	$ -	0%	
Bond Premium	$ -	0%	
Legal	$ 60,000.00	15%	
Title and Recording	$ 1,500.00	0%	
Accounting & Cost Cert.		0%	
Marketing & Rent Up		0%	
Real Estate Taxes		0%	
Insurance	$ 22,677.21	6%	
Relocation		0%	
Appraisal	$ 5,250.00	1%	
Security		0%	
Construction Loan Interest	$ 5,000.00	1%	
Predevelopment Loan Interest & Fees		0%	
Inspecting Engineer	$ 25,000.00	6%	
Fee To:	$ 7,500.00	2%	
Fee to:	$ -	0%	
LIHTC Fees		0%	
Mortgage Insurance Premium	$ -	0%	
Credit Enhancement Fees	$ -	0%	

Heat & Ventilation	$ 143,750.00	5%	
Air Conditioning	$ -	0%	
Fire Protection	$ 54,531.25	2%	
Electrical	$ 220,550.23	7%	
Maintenance Building	$ -	0%	
Solar Generation & Storage	$ 70,000.00	2%	
Other/misc.	$ 27,196.50	1%	hardware
Subtotal Structural	**$ 1,921,373.10**	65%	
Earth Work	$ 250,000.00	8%	
Site utilities	$ 62,500.00	2%	
Road & Walks	$ 82,500.00	3%	
Site Improvement	$ 56,250.00	2%	
Geotechnical Conditions	$ -	0%	
Landscaping	$ 76,250.00	3%	
Environmental Remediation	$ -	0%	
Demolition	$ -	0%	
Unusual Site Conitions	$ 31,250.00	1%	
Subtotal Site Work	**$ 558,750.00**	19%	
Total Improvements	**$ 2,480,123.10**	84%	
General Conditions	$ 145,820.06	5%	
Payment and Performance Bond	$ 27,260.00	1%	
Building Permits		0%	
Builder's Overhead	$ 157,751.37	5%	
Builder's Profit/Fee	$ 157,751.37	5%	
Total Buidler Fees	**$ 488,582.79**	16%	
Total Construction Cost	**$ 2,968,705.89**		

Constuction Contingency	**$ 296,870.59**	10%	

Letter of Credit Fees	$ -	0%	
On-Budget Syndication Costs	$ -	0%	
Development Consultant	$44,524.80	11%	
Other Consulting Fees:	$ 10,000.00	2%	Housing Consultant
Other Consulting Fees:	$ -	0%	
Other Consulting Fees	$ -	0%	
Other Consulting Fees	$ -	0%	
Other Non-Consulting Fees	$ -	0%	
Other Non-Consulting Fees	$ -	0%	
Other Non-Consulting Fees	$ -	0%	
Other Non-Consulting Fees	$ -	0%	
Total Soft Costs	**$ 405,952.01**		
Soft Cost Contingency	$ 20,297.60	5%	

Developer Fees / OH	Budget		Notes
Developer Fee	$ 275,364.64		7.5 percent of eligible costs
Developer Overhead	$ 224,932.61		7.5 percent of eligible costs
Total Developer Fees / OH	$ 500,297.25		

Reserves	Budget		Notes
Reserves	$ 50,000.00		

Developer Fees / OH	Budget	%	Per Unit
Acquisition Costs	$ -	0.0%	$ -
Soft Costs	$ 405,952.01	9.6%	$ 50,744.00
Soft Cost Contingency	$ 20,297.60	0.5%	$ 2,537.20
Construction Costs	$ 2,968,705.89	70.0%	$ 371,088.24
Constuction Contingency	$ 296,870.59	7.0%	$ 37,108.82
Developer Fees / OH	$ 500,297.25	11.8%	$ 62,537.16
Reserves	$ 50,000.00	1.2%	$ 6,250.00
Total Development Cost (TDC)	**$ 4,242,123.34**		**$ 530,265.42**

5 Year Operating Pro Forma, May 6, 2022

$Rent/Mo (80% of FMR)	Year 1	Year 1	Year 1	Year 1	Year 2	Year 3	Year 4	Year 5
$1,428	Budget	Per Unit Per Month	Per Unit Per Year	TOTAL	Total/Year +4%	Total/Year +4%	Total/Year +3%	Total/Year +3%
OPERATING INCOME (Rent)	**$ 137,088.00**	**$ 1,428**	**$ 17,136**	**$ 137,088.00**	**$ 142,571.52**	**$ 148,274.38**	**$ 154,205.36**	**$ 160,373.57**
Operating Expense								
Management Fee (5%)	$ 6,854.40	$ 71.40	$ 856.80	$ 6,854.40	$ 7,128.58	$ 7,413.72	$ 7,636.13	$ 7,865.21
Payroll, Administrative	$ 5,700.00	$ 59.38	$ 712.50	$ 5,700.00	$ 5,928.00	$ 6,165.12	$ 6,350.07	$ 6,540.58
Payroll Taxes & Benefits, Admin.	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Legal	$ 570.00	$ 5.94	$ 71.25	$ 570.00	$ 592.80	$ 616.51	$ 635.01	$ 654.06
Audit	$ 3,000.00	$ 31.25	$ 375.00	$ 3,000.00	$ 3,120.00	$ 3,244.80	$ 3,342.14	$ 3,442.41
Marketing	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Telephone	$ 1,008.90	$ 10.51	$ 126.11	$ 1,008.90	$ 1,049.26	$ 1,091.23	$ 1,123.96	$ 1,157.68
Office Supplies	$ 1,710.00	$ 17.81	$ 213.75	$ 1,710.00	$ 1,778.40	$ 1,849.54	$ 1,905.02	$ 1,962.17
Training	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Accounting & Data Processing	$ 570.00	$ 5.94	$ 71.25	$ 570.00	$ 592.80	$ 616.51	$ 635.01	$ 654.06
Investor Servicing	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
LIHTC Monitoring Fee	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
HOME Monitoring Fee	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
LIP Monitoring Fee	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
DHCD Capital Subsidy Monitoring Fee	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Other Admin (trainings, postage, etc)	$ 570.00	$ 5.94	$ 71.25	$ 570.00	$ 592.80	$ 616.51	$ 635.01	$ 654.06
Other Staffing / Travel	$ 1,140.00	$ 11.88	$ 142.50	$ 1,140.00	$ 1,185.60	$ 1,233.02	$ 1,270.01	$ 1,308.12
Other	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Subtotal: Administrative	$ 14,268.90	$ 148.63	$ 1,783.61	$ 14,268.90	$ 14,839.66	$ 15,433.24	$ 15,896.24	$ 16,373.13
Payroll, Maintenance	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Payroll Taxes & Benefits, Admin.	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Janitorial Materials	$ 1,000.00	$ 10.42	$ 125.00	$ 1,000.00	$ 1,040.00	$ 1,081.60	$ 1,114.05	$ 1,147.47
Lock and Key Replacement	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Landscaping	$ 8,550.00	$ 89.06	$ 1,068.75	$ 8,550.00	$ 8,892.00	$ 9,247.68	$ 9,525.11	$ 9,810.86
Decorating (inter. Only)	$ 3,363.00	$ 35.03	$ 420.38	$ 3,363.00	$ 3,497.52	$ 3,637.42	$ 3,746.54	$ 3,858.94

Repairs (inter. & ext.)	$ 14,250.00	$ 148.44	$ 1,781.25	$ 14,250.00	$ 14,820.00	$ 15,412.80	$ 15,875.18	$ 16,351.44
Elevator Mainenance	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Trash Removal	$ 500.00	$ 5.21	$ 62.50	$ 500.00	$ 520.00	$ 540.80	$ 557.02	$ 573.73
Snow Removal	$ 2,850.00	$ 29.69	$ 356.25	$ 2,850.00	$ 2,964.00	$ 3,082.56	$ 3,175.04	$ 3,270.29
Extermination	$ 855.00	$ 8.91	$ 106.88	$ 855.00	$ 889.20	$ 924.77	$ 952.51	$ 981.09
Recreation	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Other Major Repairs	$ 2,850.00	$ 29.69	$ 356.25	$ 2,850.00	$ 2,964.00	$ 3,082.56	$ 3,175.04	$ 3,270.29
Other	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Subtotal: Maintenance	$ 34,218.00	$ 356.44	$ 4,277.25	$ 34,218.00	$ 35,586.72	$ 37,010.19	$ 38,120.49	$ 39,264.11
Resident Services	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Security	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Other	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Electricity	$ 114.00	$ 1.19	$ 14.25	$ 114.00	$ 118.56	$ 123.30	$ 127.00	$ 130.81
Natural Gas	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Oil	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Water & Sewer	$ 1,824.00	$ 19.00	$ 228.00	$ 1,824.00	$ 1,896.96	$ 1,972.84	$ 2,032.02	$ 2,092.98
Subtotal: Utilities	$ 1,938.00	$ 20.19	$ 242.25	$ 1,938.00	$ 2,015.52	$ 2,096.14	$ 2,159.03	$ 2,223.80
Replacement Reserve (5%)	$ 6,854.40	$ 71.40	$ 856.80	$ 6,854.40	$ 7,128.58	$ 7,413.72	$ 7,636.13	$ 7,865.21
Operating Reserve (2%)	$ 2,741.76	$ 28.56	$ 342.72	$ 2,741.76	$ 2,851.43	$ 2,965.49	$ 3,054.45	$ 3,146.09
Subtotal Reserves	$ 9,596.16	$ 99.96	$ 1,199.52	$ 9,596.16	$ 9,980.01	$ 10,379.21	$ 10,690.58	$ 11,011.30
Real Estate Taxes	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Other Taxes	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Insurance	$ 18,000.00	$ 187.50	$ 2,250.00	$ 18,000.00	$ 18,720.00	$ 19,468.80	$ 20,052.86	$ 20,654.45
MIP	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Taxes and Insurance	$ 5,575.00	$ 58.07	$ 696.88	$ 5,575.00	$ 5,798.00	$ 6,029.92	$ 6,210.82	$ 6,397.14
Other	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Subtotal: Taxes, Insurance	$ 23,575.00	$ 245.57	$ 2,946.88	$ 23,575.00	$ 24,518.00	$ 25,498.72	$ 26,263.68	$ 27,051.59
TOTAL EXPENSES	**$ 90,450.46**	**$ 942.19**	**$ 11,306.31**	**$ 90,450.46**	**$ 94,068.48**	**$ 97,831.22**	$ 100,766.15	$ 103,789.14
Cash Flow	**$ 46,637.54**	**$ 485.81**	**$ 5,829.69**	**$ 46,637.54**	**$ 48,503.04**	**$ 50,443.16**	**$ 53,439.20**	**$ 56,584.43**
Mortgage Expense	**$ 34,700.00**	**$ 361.46**	**$ 4,337.50**	**$ 34,700.00**	**$ 34,700.00**	**$ 34,700.00**	**$ 34,700.00**	**$ 34,700.00**
Net Cash Flow	**$ 11,937.54**	**$ 124.35**	**$ 1,492.19**	**$ 11,937.54**	**$ 13,803.04**	**$ 15,743.16**	**$ 18,739.20**	**$ 21,884.43**

Dennis Community Preservation Application

May 6, 2022

I. Reference Letters
   1. MA Department of Developmental Services
   2. Dennis Select Board

II. Letters of Support
   1. Cape Abilities
   2. Housing Assistance Corporation
   3. Parent with adult child living in Phase I House
   4. Parent with adult child living in Phase I House
   5. Parent with adult child living at home

PO Box 1174, South Dennis, MA 02660
www.go-forward.org
508-385-4663

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May 6, 2022

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The Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Developmental Services
SOUTHEAST REGION
151 Campanelli Drive, Suite B
Middleboro, MA 02346

Charles D. Baker
Governor

Karyn E. Polito
Lieutenant Governor

Marylou Sudders
Secretary

Jane Ryder
Commissioner

Richard]. O'Meara
Regional Director

Tel: 508-866-5000
FAX: 617-727-7822

April 1, 2022

To Whom It May Concern:
FORWARD
PO Box 1174
South Dennis, MA 02660

I am writing to confirm our support for Forward, a housing program for 8 adults with developmental disabilities, currently being planned in Dennis, MA.

Subject to the availability of funding, the Department of Developmental Services (DDS) will refer eligible clients prioritized for residential services to this residential program.

Please feel free to contact me at 508-866-8871 if you have any questions or require additional information.

Sincerely,

Richard J. O'Meara
Regional Director

Town of Dennis
685 Route 134, South Dennis, MA 02660 / Telephone: 508-394-8300 Fax: 508-394-8309

FORWARD at the Rock
PO Box 1174
South Dennis, MA 02660

Re: Letter of Support

Dear **FORWARD** at the Rock,

Since 2014, F.O.R.W.A.R.D has been diligently working to take this project from a vision to a reality, organizing as a 501c3, raising awareness, and exploring various partnerships and funding opportunities for the purpose of building affordable homes for adults with autism and related disabilities.

FORWARD is one of only a few nonprofit organizations specializing in building new affordable housing specifically designed and exclusively available for adults with autism and related developmental disabilities. In 2020 we completed construction of FORWARD at the Rock, two group homes which enabled eight adults with profound disabilities to settle into their forever homes. The homes are single story and 100% handicap compliant with around-the-clock staffing provided by Cape Abilities so that residents can age-in-place in a comfortable, safe and appropriate environment.

FORWARD is now embarking on a new project to build affordable homes at FORWARD at the Rock on Hokum Rock Road in Dennis. This new construction will create eight affordable one-bedroom independent living apartments to accommodate higher functioning developmentally disabled adults who still need supportive services, health and safety supervision and access to 24-hour emergency response, but do not require a congregate setting with around-the-clock staffing. These new homes represent the fulfillment of FORWARD's original commitment to the Town of Dennis to build 16 special needs housing units at the site. They will be built in a residential neighborhood on land owned by the Town of Dennis and leased to FORWARD for 99 years at $1.00 per year rent. The neighborhood is convenient to amenities, and the new Dennis Fire Station is now being built on an adjacent lot.

All apartments will be built at ground level, and will be ADA compliant and barrier free, and responsive to the special sensory needs of the residents. All apartments are being designed for intensive use of assistive technology and remote staffing, and incorporation of lessons learned from the impacts of Covid and the changing environment. Built to be highly energy efficient, apartments will feature on-demand hot water heaters and mini-split heat pump heating and cooling systems, and high efficiency appliances. All units will have clothes washers and dryers, rear patios, separate entries and extra storage.

All residents will be clients of the Department of Developmental Services, and the agency will select and place residents eligible for rent vouchers with a mix of affordability of extremely low income and very low income. It will add 8 units of very low (≥ 50% of AMI) and extremely low (≥ 30% of AMI) affordable housing to the Cape's inventory, adding 8 units to the Dennis Subsidized Housing Inventory. This will also add housing for potential new members of the Dennis workforce. Residents will be selected and supported be the Department of Developmental Services.

At their April 5, 2022 meeting, the Dennis Select Board resoundingly voted to express our support of this project and all related grant and fundraising efforts. This project will allow a small group of unique individuals to live and truly become part of our local Community. We heartily endorse all grant applications available for this project and the work done by FORWARD to help address the great need for affordable housing for adults with Autism.

Sincerely,

The Dennis Select Board

Christopher Flanagan

Christopher Flanagan, Chair

J Terrio

John Terrio, Vice Chair

Paul McCormick

Paul McCormick

Chris Lambton

Christopher Lambton

Sheryl A McMahon

Sheryl McMahon

May 4, 2022

Cape Abilities[SM]

Creating Opportunity

Since 1968

To Whom It May Concern,

I am writing today to express the positive feedback I have regarding FORWARD - Friends Or Relatives With Autism & Related Disabilities, as our landlord. I am a Senior Manager for Cape Abilities Inc., and I oversee both sides of 131 Hokum Rock Rd. I also currently manage Side A until we hire someone for the position. FORWARD is our landlord and they have been tremendous landlords. Anytime there is any issue with the house, they act quickly on trying to resolve it, while also working as a team with myself and the gentleman who manages Side B to problem solve when necessary. They are not overly intrusive on the property what-so-ever, and let us know when they plan to stop by and what they're planning to stop by for.

The staff members on both sides A and B are very happy with FORWARD as well, and feel fully supported. The tenants are absolutely thriving since moving into 131 Hokum Rock Rd. It is such a beautiful home, and they all feel very lucky to be here. The tenants love to utilize the amenities we have, inside and outside. Inside each side, feels like a true home, with tons of games, crafts, and space for each tenant if they need some alone time. The patio and large grill are wonderful as well in the warmer months. Also outside, we were able to install 3 wheelchair accessible garden beds. We also were able to get 4 chickens that currently lay eggs. FORWARD Executive Director, David Kaplan, and President, Kathy Ohman, have always been extremely supportive of any of the ideas we have about how we can enrich the lives of the tenants even more.

In conclusion, FORWARD have been wonderful landlords all around. They communicate clearly. They are on top of everything. They are kind, communicative, and respect the space and privacy of the tenants. I don't think we could have asked for a better landlord.

Sincerely,

K. Gallagher

Katie Gallagher
Senior Residential Program Manager
508-274-9320
kgallagher@capeabilities.org
Cape Abilities Inc.

Housing Assistance

April 6, 2022

To Whom It May Concern:

I am writing to express my support for Phase 2 of the FORWARD at the Rock project on Hokum Rock Road in Dennis, MA. Housing Assistance Corporation (HAC) partnered with FORWARD in Phase 1 of the project, which resulted in the successful construction of a duplex style group home with eight units of affordable housing for adults with developmental disabilities. HAC is excited to be joining FORWARD again as development consultant on Phase 2.

Phase 2 will create an additional eight affordable one-bedroom independent living apartments to accommodate higher functioning developmentally disabled adults who still need supportive services, health and safety supervision and access to 24-hour emergency response, but do not require a congregate setting with around-the-clock staffing.

HAC understands the challenges of finding safe and affordable housing on Cape Cod for people of all income levels. This is especially true for developmentally disabled adults who historically, have limited options to live independently. As an affordable housing developer, HAC understand the challenges of planning, designing, and funding a complex project in an environment of sky-rocketing construction costs. Through their success in Phase 1, FORWARD has proven that they have the ability to manage complex affordable housing development project from start to finish. HAC is happy to support FORWARD's efforts in Phase 2 of this project and are confident the results will be the same.

I hope you will support this important project.

Sincerely,

David Quinn
Director or Housing Development and Planning
Housing Assistance Corporation
dquinn@haconcapecod.org
(508) 280-8465

April 28, 2022

Dennis Community Preservation Committee
Town of Dennis, Dennis, MA

Re: Application for Funding for Phase 11 for Forward @ the Rock, Dennis, MA

Committee Members,
I am writing this letter to show my full support for the above mentioned application to the Dennis Community Preservation Committee for funding for Phase 11 for Forward @ the Rock located at 131 Hokum Rock Road in Dennis.

My adult son, Brendan P. Shea, is one of the residents living at Unit B at 131 Hokum Rock Road in Dennis, which is run by Cape Abilities. Brendan is a great young man who has autism. He has been living at this wonderful, safe, new home, constructed by Forward @ the Rock & Cape Abilities, since October 2020. I can not put into words how magical this living experience has been for Brendan. He has a new world filled with shared experiences and great activities at Forward @ the Rock. Living with his three housemates, while being supported by the wonderful staff from Cape Abilities has opened up a whole new world to Brendan. The new home includes new opportunities and activities for the residents such as shared common living experiences, learning new skills, attending to house chores, preparing meals, working in the garden areas where the residents grow and harvest their own vegetables, caring for the new chickens which provide fresh eggs for the residents, and enjoying the beautiful surroundings around this shared home. Forward @ the Rock provides Brendan and his 3 house mates with new opportunities for social experiences, group experiences, and personal growth within the local community, and the surrounding towns within the Cape Cod area.

I have witnessed the personal growth and maturity of Brendan since his time of living at Forward @ the Rock. I never in my wildest dreams thought I would find such a great home, with a safe environment, with great housemates, and with such great supporting staff to help Brendan achieve his own personal goals and happiness. As a parent of a son with a challenging disability, Forward @ the Rock is a dream come true. I fully support the required funding for Phase 11 for Forward @ the Rock, so that other families with loved ones who have challenging disabilities can experience what my family has experienced, and what my son has experienced.

Please vote favorably for this much needed funding for Phase 11 for Forward @ the Rock.

Paul J. Shea

Paul J. Shea

Taylor
68 Raymond Avenue
South Yarmouth, MA 02664

April 29, 2022

Dennis Community Preservation Committee

Dear Committee Members,

One of the hardest things about raising a child with an intellectual disability is the fear of what will happen to him when we are gone. Where will he go? Who will take care of him? Will he be okay? Will he be scared? These are questions that always lurk in the background. As time goes on and your child gets older, they move to the front of your mind and weigh on you heavily. When the pandemic hit, those questions became louder for my family. With so many people dying, I kept wondering what will happen to my son if my husband and I get COVID. It made my fear of my son leaving our home for the first time while dealing with our deaths all too real.

Justin was 32 years old when he moved into FORWARD at the Rock. I must be honest with you; I wasn't sure it would work out. Justin had only been apart from us a handful of times his entire life and cried through most of those times. But we got him on board with moving in and it worked. He quickly grew to love his staff, who by the way, are incredible. They continually work with him, and he has grown so much. He went from relying on us to do most everything for him to doing his own laundry (and apparently everyone else's, too; he's the laundry king lol), making sandwiches and doing his own personal care. He has become more confident and outgoing. His speech has improved, and he has expanded his diet to include foods I was unable to convince him to try. Everyone who knows him has commented on how much he has grown.

This experience has impacted my husband and me, too. We are finally secure in the knowledge that should something happen to us, Justin is in a safe, familiar place. He's already made the transition while we were here to help him through it. Our relationship has changed from a parent/child one to a parent/young man one. It's been a great shift. Very rewarding.

I am asking that you support FORWARD's application so that other families in our situation can experience the incredibleness and peace of mind that we have been fortunate to receive.

Sincerely,

Cathy Taylor

FORWARD

David Kaplan <dkaplan@go-forward.org>

Letter of support

1 message

Jodie Tulloch <jodtllch@aol.com>
To: dkaplan@go-forward.org

Thu, Apr 7, 2022 at 7:46 AM

Hi David,

My name is Jodie Tulloch and have been a Dennis resident since 1993. My son Matty is 34 years old and is Autistic. He lives with my husband and I and goes to an Adult Day Program 3 days a week.

I know how limited residential services are for people like my son and we need more facilities like FORWARD. I know FORWARD would do an amazing job integrating Phase2 into our community. I fully support FORWARD.

Hoping for a successful support with this next phase.

All the best,
Jodie Tulloch
146 Bay Ridge Drive
South Dennis, MA 02660

Sent from my iPad

Sent from my iPad

FORWARD
Friends Or Relatives With Autism & Related Disabilities
Opening Hearts ♥ Building Homes

Friends Or Relatives With Autism & Related Disabilities

Dennis Community Preservation Application

May 6, 2022

Aerial Views of Site

Original Deed

Recorded Plan Book and Page Lot Lines

Town Tax Card

Extract of October 28, 2014 Special Town Meeting Article 3

Lease Exhibit Survey

ALTA Stamped Survey

PO Box 1174, South Dennis, MA 02660
www.go-forward.org
508-385-4663


Perimeter
879 ft
Area
47,485 ft²
Start new
PHASE II
PHASE I
Google Earth
Imagery date: 10/6/18–newer
Imagery and data attributions
30 m
Camera: 195 m 41°43'57"N 70°10'25"W
35 m

Printed on 02/28/2022 at 04:23 PM

Town of Dennis, MA

1199.
386

COMMONWEALTH OF MASSACHUSETTS

BARNSTABLE, ss.

OFFICE OF THE SELECTMEN
OF THE TOWN OF DENNIS

****

ORDER OF TAKING OF THE FEE SIMPLE IN LAND IN DENNIS, BARNSTABLE COUNTY, MASSACHUSETTS, BY THE SELECTMEN OF DENNIS FOR MUNICIPAL PURPOSES

****

Plan Filed in Plan Book 176 Page 125

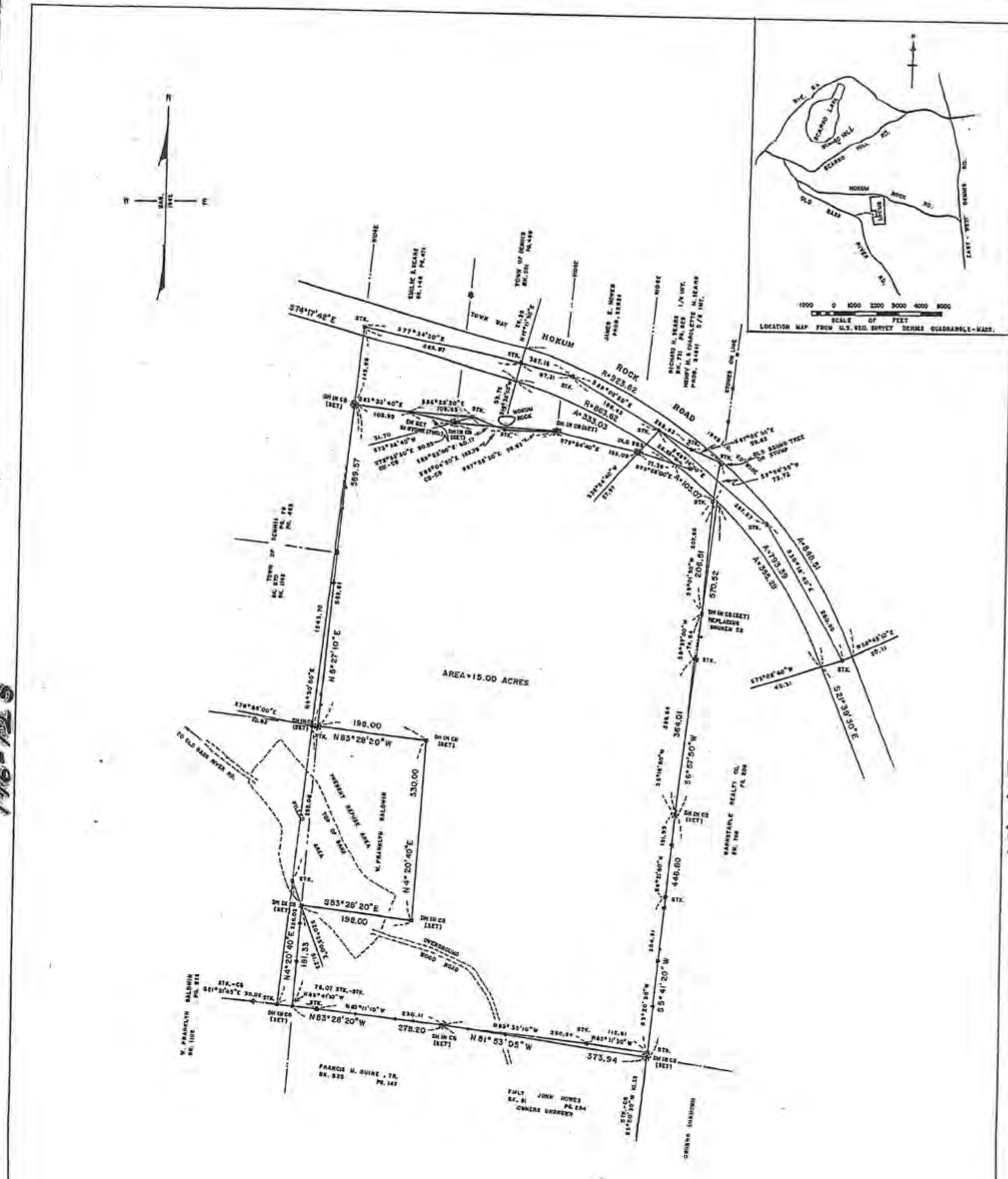
We, EARLE M. DAVIDSON, KIRKWOOD B. BROWN, and DAVID B. LANE, JR. as the duly elected and qualified Selectmen of the Town of Dennis, a Municipal Corporation located in the County of Barnstable in the Commonwealth of Massachusetts, acting for and on behalf of said Town of Dennis, under the provisions of Chapter 40 of the General Laws, (Ter. Ed.) and Acts in amendment thereof and in addition thereto and under the power conferred upon us as such Selectmen by the vote of said Town of Dennis, while acting under Article 57 of the Warrant for the Annual Town Meeting of the Inhabitants of said Dennis, duly called and held on the 5th day of March 1963, as will more particularly appear by reference to the records of the Town Clerk of said Dennis, and by virtue of every other power us hereto enabling, having complied with all the preliminary requirements prescribed by law, do ADOPT AND DECREE this ORDER OF TAKING and do hereby, and for Municipal purposes take the fee simple by EMINENT DOMAIN for and on behalf of said Town of Dennis under provisions of Chapter 79 of the General Laws and Acts in amendment thereof or in addition thereto, in lands situate in Dennis at or near the village of Dennis, so-called, more particularly bounded and described as follows:-

Northeasterly by Hokum Rock Road 105.07 feet; thence S 6°57'50"W, 570.52 feet to a point; thence S 5°41'20" W, 446.80 feet to a point; thence N 81°53'05" W 373.94 feet to a point; thence N 83°28'20" W, 278.20 feet to a point; thence N 4°20'40" E, 181.33 feet to a point; thence S 83°28'20" E, 198.00 feet to a point thence N 4°20'40" E, 330.00 feet to a point; thence N83°28'20" W, 198.00 feet to a point; thence N 5°27'10" E, 589.57 feet to a point; thence S 83°33'40" E, 103.95 feet to a point; thence S 78°35'30" E, 80.59 feet to a point; thence S 85°04'50" E, 185.78 feet to a point; thence S75°54'40" E, 155.09 feet to a point; thence S 73°58'00" E, 71.36 feet to the point of beginning containing an area of 15.00 acres all as shown on plan of land in Dennis, Massachusetts, for the Town of Dennis. October 16, 1962. Scale 1" - 80', Thomas E. Kelley, Surveyor, Dennis, Mass. And we award as damages to William E. Crowell & William P. Stone the sum of $6000.00.

Adopted and dated at Dennis, Barnstable County, Massachusetts, this 29th day of April A. D. 1963.

Earle M. Davidson
Kirkwood B. Brown
David B. Lane Jr.
SELECTMEN - TOWN OF DENNIS

Barnstable, ss., Received May 2. 1963. and is recorded.



PLAN OF LAND IN EAST DENNIS, MASSACHUSETTS

OCTOBER 16, 1962 SCALE 1" = 80'

THOMAS E. KELLEY
SURVEYOR
DENNIS, MASS.

I CERTIFY THAT THIS ACTUAL SURVEY WAS MADE ON THE GROUND IN ACCORDANCE WITH THE LAND COURT INSTRUCTIONS OF 1959 BETWEEN APRIL 17 AND SEPT. 4, 1962.
OCTOBER 16, 1962 Thomas E. Kelley
REG. LAND SURVEYOR

APPROVAL UNDER THE SUBDIVISION CONTROL LAW NOT REQUIRED.
DATE 12/10/62
E. Everett Howes
Henry Hatfield
DENNIS PLANNING BOARD

REGISTRY OF DEEDS
MAY 2 - 1963
10 H 10 M A M
RECORDED

DEED REF. - BK. 891 PG. 524

WILLIAM E. CROWELL & WILLIAM P. STONE - PETITIONERS

Plan-Book 176 Page 125

Key: 12770

Town of DENNIS - Fiscal Year 2018

12/10/2017 2:31 pm SEQ #: 13,215

LEGAL

CURRENT OWNER	PARCEL ID	LOCATION
TOWN OF DENNIS MUNICIPAL DEPARTMENT 685 ROUTE 134 SOUTH DENNIS, MA 02660	311-3-0	350 PADDOCKS PATH ED

TRANSFER HISTORY	DOS	T	SALE PRICE	BK-PG (Cert)
TOWN OF DENNIS	05/10/1963	X		1199-386

CLASS	CLASS%	DESCRIPTION	BN ID	BN	CARD
9300	100	VAC,SELECT/CITY CNCL			1 of 1

PMT NO	PMT DT	TY	DESC	AMOUNT	INSP	BY	1st	%

LAND

CD	T	AC/SF/UN	Nbhd		FEMA		Infl1		ADJ BASE	SAF	Infl2		Lpi	VC	CREDIT AMT	ADJ VALUE
100	A	0.918	18	1.00	R	1.00	1	1.00	223,440	1.00	1	1.00 R03	1.20			205,120
300	A	3.982	18	1.00	R	1.00	1	1.00	17,640	0.91	1	1.00 R03	1.20			64,070
350	A	10.100	18	1.00	R	1.00	1	1.00	4,800	0.88	1	1.00 R03	1.20			42,630

TOTAL 15.000 Acres | ZONING | FRNT 0

Nbhd	SCARGO
FEMA	OLD PK CODE
Infl1	AVERAGE

NOTE: EMINENT DOMAIN PLAN 176/125

ASSESSED	CURRENT	PREVIOUS
LAND	311,800	30,900
BUILDING	0	0
DETACHED	0	0
OTHER	0	0
TOTAL	311,800	30,900

DETACHED

TY	QUAL	COND	DIM/NOTE	YB	UNITS	ADJ PRICE	RCNLD

PHOTO

BLDG COMMENTS

BUILDING

BUILDING	CD	ADJ	DESC
MODEL			
STYLE			
QUALITY			
FRAME			

MEASURE	
LIST	
REVIEW	

YEAR BLT		SIZE ADJ	
NET AREA		DETAIL ADJ	
$NLA(RCN)		OVERALL	

CAPACITY	UNITS	ADJ

ELEMENT	CD	DESCRIPTION	ADJ

S	BAT	T	DESCRIPTION	UNITS	YB	ADJ PRICE	RCN

TOTAL RCN	
CONDITION ELEM	CD
EFF.YR/AGE	
COND	
FUNC	
ECON	
DEPR	% GD
RCNLD	

Town of Dennis
P.O. BOX 2060, SOUTH DENNIS, MA 02660-1614 / Telephone: 508-394-8300 • Fax 508-394-8309

EXTRACT

SPECIAL TOWN MEETING

October 28, 2014

ARTICLE 3. To see if the Town will vote to authorize the Board of Selectmen to lease for a term of no more than 99 years, such portion of the premises located on Hokum Rock Road, being the northerly portion of the property shown on Assessor's Map 311, Parcel 3 containing approximately 4.9 acres, as shown on the map entitled "Hokum Rock Road Parcel" and filed with the Town Clerk's Office for the purpose of affordable housing and other support facilities for autistic adults and those with similar conditions, on such terms and conditions, and for such consideration, which may be nominal consideration, as the Board of Selectmen deems appropriate, and authorize the Board of Selectmen to accept on behalf of the Town, an affordable housing restriction, enforceable in perpetuity in compliance with G.L. Chapter 184, Sections 31-32, or take any other action relative thereto. In addition, all work on said property will be restricted to an area outside the water district zone of contribution, be limited to no more than 16 bedrooms, with all septic installations to be placed as far north toward Hokum Rock Road as possible.

MOTION. On motion of Board of Selectmen Member Wayne Bergeron, duly seconded, it was voted 213 yes to 8 no to lease for a term of no more than 99 years, such portion of the premises located on Hokum Rock Road, being the northerly portion of the property shown on Assessor's Map 311, Parcel 3 containing approximately 4.9 acres, as shown on the map entitled "Hokum Rock Road Parcel" and filed with the Town Clerk's Office for the purpose of affordable housing and other support facilities for autistic adults and those with similar conditions, to be located on such portion of the property outside the water district zone of contribution, be limited to no more than 16 bedrooms with septic installations placed on the far northerly portion of the property toward Hokum Rock Road and on such other terms and conditions, and for such consideration, which may be nominal consideration, as the Board of Selectmen deems appropriate, and authorize the Board of Selectmen to accept on behalf of the Town, an affordable housing restriction, enforceable in compliance with General Laws Chapter 184.

A True Copy, Attest:

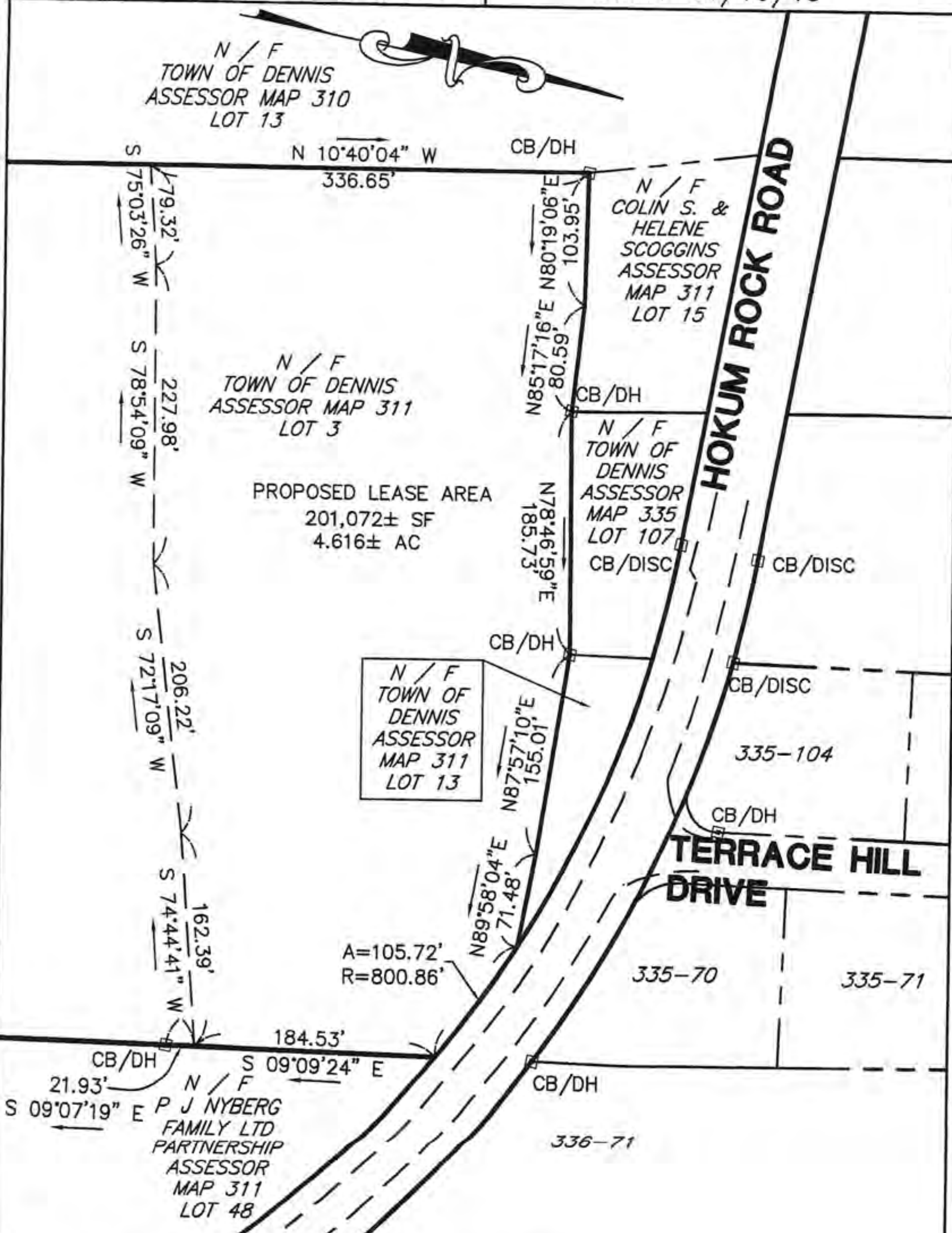
Theresa T. Bunce

Theresa T. Bunce, CMC
Dennis Town Clerk

Lease Exhibit Plan in Dennis, MA

Address: 131 Hokum Rock Road, Dennis, MA.

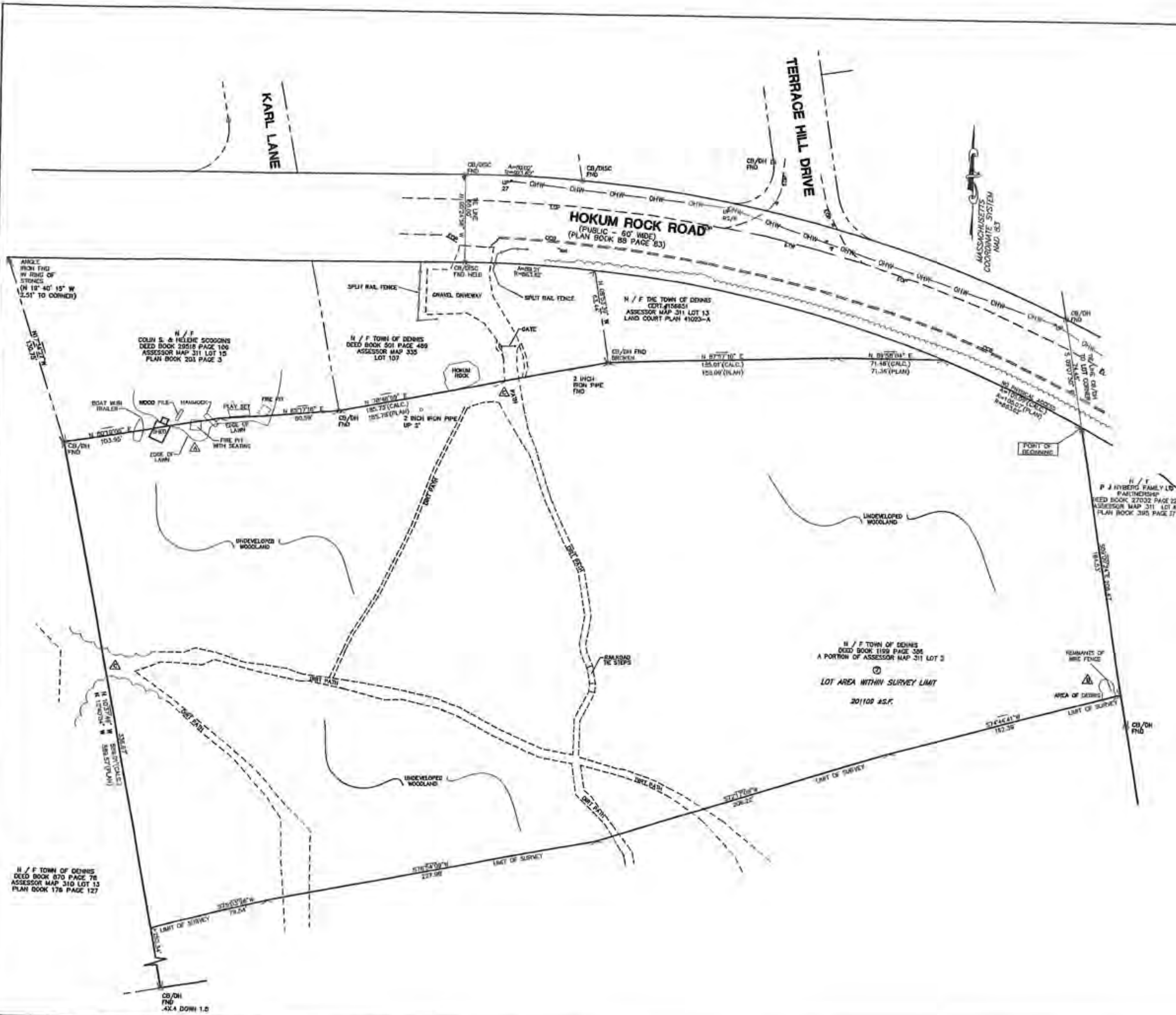
Prepared For : FORWARD P.O. BOX 1174 S. Dennis, MA.	SHEET 1 OF 1 Date: 01/10/19

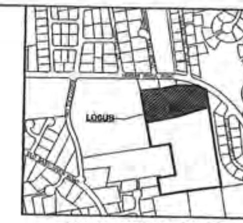


Baxter Nye Engineering & Surveying
Registered Professional
Engineers and Land Surveyors
78 North Street, 3rd Floor
Hyannis, MA 02601
Phone – (508) 771-7502 Fax – (508)-771-7622

Scale : 1" = 100'

DRAFT





LOCUS MAP NOT TO SCALE

GENERAL NOTES:

1. THE INTENT OF THIS PLAN IS TO DETAIL EXISTING SITE CONDITIONS FOR A PORTION OF 131 HOKUM ROCK ROAD.
2. LOCUS AREA IS COMPRISED OF: PER CURRENT ASSESSOR'S RECORDS:

   OWNER: TOWN OF DENNIS MUNICIPAL DEPARTMENT
   DEED BOOK 1199 PAGE 386
   A PORTION OF RECORD PLAN BOOK 178 PAGE 125
   A PORTION OF ASSESSOR'S MAP 311, PARCEL 3-0
3. A TITLE SEARCH HAS BEEN PROVIDED TO BAXTER-NYE ENGINEERING AND SURVEYING FOR THIS SITE BY MATTHEW M. TERRY, ESQUIRE, DATED MAY 31, 2018, AMENT KLAUER LLP, 39 TOWN HALL SQUARE-FALMOUTH, MA 02540. AN INDEPENDENT TITLE SEARCH HAS NOT BEEN PERFORMED FOR THIS SITE BY BAXTER-NYE ENGINEERING AND SURVEYING.
4. THE PROPERTY LINE INFORMATION SHOWN IS BASED ON CURRENT AVAILABLE RECORD INFORMATION CONSISTING OF PLANS AND DEEDS. THE EXISTING FEATURES SHOWN HEREON WERE OBTAINED FROM AN ON THE GROUND FIELD SURVEY PERFORMED BY BAXTER NYE ENGINEERING & SURVEYING ON SEPTEMBER 8 AND 11, 2018 AND SUPPLEMENTED JUNE 25, 2019.
5. BY GRAPHIC PLOTTING ONLY THE PROPERTY SHOWN HEREON IS LOCATED IN COMMUNITY PANEL NUMBER: 250005 0581 J. THE FLOOD INSURANCE RATE MAP DEFINES THIS AREA AS ZONE "X - OTHER AREAS".
6. DIRT PATHWAYS SHOWN HEREON APPEAR TO BE AVAILABLE FOR PUBLIC USE.
7. NO BUILDINGS OBSERVED ON DATED OF SURVEY.
8. NO PHYSICAL ACCESS VISIBLE TO LOCUS AS OF DAY OF SURVEY.
9. ABUTTER INFORMATION DEPICTED IS DERIVED FROM THE TOWN OF DENNIS ASSESSOR DATA BASE.
10. THE WORD "CERTIFY", AS USED HEREON, IS UNDERSTOOD TO BE AN EXPRESSION OF PROFESSIONAL OPINION BY THE LAND SURVEYOR WHICH IS BASED ON HIS BEST KNOWLEDGE, INFORMATION, AND BELIEF, FORMULATED IN ACCORDANCE WITH COMMONLY ACCEPTED PROCEDURES CONSISTENT WITH APPLICABLE STANDARDS OF PRACTICE, AND AS SUCH IT CONSTITUTES NEITHER A GUARANTEE NOR WARRANTY, EITHER EXPRESS OR IMPLIED. THE CERTIFICATIONS SHOWN ARE NOT CERTIFICATIONS TO THE TITLE OR OWNERSHIP OF THE PROPERTIES SHOWN.

LEGEND:

POSSIBLE ENCROACHMENTS △

SCHEDULE B PART 1 EXCEPTIONS ○

BAXTER NYE
ENGINEERING & SURVEYING

Registered Professional Engineers and Land Surveyors

78 North Street - 3rd Floor
Hyannis, Massachusetts 02601

Phone - (508) 771-7502
Fax - (508) 771-7622
www.baxter-nye.com

STAMP

STAMP

CONSULTANT

ARCHITECT

PREPARED FOR:
FORWARD
PO Box 1174,
South Dennis, MA 02660

PROJECT TITLE
Hokum Rock Home
131 Hokum Rock Road
Dennis, MA

NO	BY	DATE	DESCRIPTION

SHEET TITLE
ALTA/NSPS LAND TITLE SURVEY

SHEET NO
C1.0

DATE: AUGUST 02, 2019

SCALE IN FEET 30 0 30 60

SCALE: 1"=30'

DRAWN BY: SM CHECKED BY: SM

JOB NO: 2017-098 FILE: 2017-098 ALTA.dwg

SCHEDULE B, PART I
EXCEPTIONS FROM COVERAGE
POLICY No.– 5011300-3060989a ◯ (TYP.)

1. ANY FACTS, RIGHTS, INTERESTS, OR CLAIMS THAT ARE NOT SHOWN IN THE PUBLIC RECORDS BUT THAT COULD BE ASCERTAINED BY AN INSPECTION OF THE LAND OR BY MAKING INQUIRY OF PERSONS IN POSSESSION OF THE LAND. (NOT PLOTTABLE)
2. ANY ENCROACHMENT, ENCUMBRANCE, VIOLATION, VARIATION, OR ADVERSE CIRCUMSTANCE AFFECTING THE TITLE, INCLUDING DISCREPANCIES, CONFLICTS IN BOUNDARY LINES, SHORTAGE IN AREA, OR ANY OTHER FACTS THAT WOULD BE DISCLOSED BY AN ACCURATE AND COMPLETE LAND SURVEY OF THE LAND, AND THAT ARE NOT SHOWN IN THE PUBLIC RECORDS. (NOT PLOTTABLE)
3. ANY LIEN, OR RIGHT TO A LIEN, FOR SERVICES, LABOR OR MATERIAL HERETOFORE OR HEREAFTER FURNISHED, IMPOSED BY LAW AND NOT SHOWN IN THE PUBLIC RECORDS. (NOT PLOTTABLE)
4. THE MORTGAGE, IF ANY, REFERRED TO IN ITEM 4 OF SCHEDULE A. (THIS EXCEPTION DOES NOT APPLY TO LOAN POLICIES). (NOT PLOTTABLE)
5. LIENS FOR TAXES AND ASSESSMENTS WHICH BECOME DUE AND PAYABLE SUBSEQUENT TO THE DATE OF POLICY AS A RESULT OF EITHER THE LAND OR THE USE THEREOF BEING CHARACTERIZED BY THE APPLICABLE TAXING AUTHORITIES AS FOR-PROFIT AND NOT THE CURRENT, NON-PROFIT, TAX-EXEMPT USE. (NOT PLOTTABLE)
6. IF THE INSURED PREMISES IS A CONDOMINIUM UNIT; COVENANTS, CONDITIONS, RESERVATIONS, EASEMENTS, LIENS FOR ASSESSMENTS, OPTIONS, POWERS OF ATTORNEY, AND LIMITATIONS ON TITLE, CREATED BY THE LAWS OF THE STATE OF THE INSURED PREMISES OR SET FORTH IN THE MASTER DEED OR DECLARATION OF CONDOMINIUM, IN THE RELATED BY-LAWS, IN THE DECLARATION OF TRUST, OR SITE PLANS AND FLOOR PLANS AS DULY RECORDED IN THE APPROPRIATE LAND RECORDS OFFICE AND AS THE SAME MAY HAVE BEEN LAWFULLY AMENDED, AND IN ANY INSTRUMENT CREATING THE ESTATE OR INTEREST INSURED BY THIS POLICY. (NOT PLOTTABLE)
7. ORDER OF TAKING BY THE TOWN OF DENNIS BOARD OF SELECTMEN DATED APRIL 29, 1983 RECORDED WITH BARNSTABLE COUNTY REGISTRY OF DEEDS IN BOOK 1100, PAGE 286. (A PORTION PLOTTED HEREON)
8. DECISION BY THE TOWN OF DENNIS PLANNING BOARD DATED JULY 24, 2017 RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS IN BOOK 31183, PAGE 12 AS AFFECTED BY MODIFICATION DATED OCTOBER 10, 2018 RECORDED WITH SAID DEEDS IN BOOK 31668, PAGE 83. (NOT PLOTTABLE)
9. AFFORDABLE HOUSING RESTRICTION DATED AUGUST 2, 2019 GIVEN BY FRIENDS OR RELATIVES WITH AUTISM & RELATED DISABILITIES – F.O.R.W.A.R.D., INC. FOR THE BENEFIT OF THE COMMONWEALTH OF MASSACHUSETTS ACTING BY AND THROUGH THE DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT FOR ITSELF AND AS AGENT FOR THE FOLLOWING LENDERS: COMMUNITY ECONOMIC DEVELOPMENT ASSISTANCE CORPORATION, A BODY POLITIC AND CORPORATE, DULY ORGANIZED AND EXISTING IN ACCORDANCE WITH CHAPTER 40H OF THE MASSACHUSETTS GENERAL LAWS; THE TOWN OF DENNIS; AND THE INHABITANTS OF THE TOWN OF BARNSTABLE A MASSACHUSETTS MUNICIPAL CORPORATION KNOWN AS THE TOWN OF BARNSTABLE ORGANIZED UNDER A CHARTER ADOPTED PURSUANT TO MASS. CONST. AMEND. ART. 89 § 3 ON APRIL 11, 1989 AND OTHERS RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS ON AUGUST 2, 2019 IN BOOK 32201, PAGE 178. (NOT PLOTTABLE)
10. LEASEHOLD MORTGAGE TO BLUEHUB CAPITAL, INC. DATED AUGUST 2, 2019 IN THE ORIGINAL PRINCIPAL AMOUNT OF $750,000 RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS ON AUGUST 2, 2019 IN BOOK 32201, PAGE 200. (NOT PLOTTABLE)

EXHIBIT A
POLICY No. – 5011300-3060989a

A CERTAIN PARCEL OF LAND LOCATED OFF HOKUM ROCK ROAD, DENNIS, MASSACHUSETTS, CONTAINING A TOTAL OF 4.616± ACRES, WHICH IS A PORTION OF THE LAND SHOWN ON TOWN ASSESSOR'S MAP 311 AS PARCEL 3 AND SHOWN ON A PLAN OF LAND ENTITLED "LEASE EXHIBIT PLAN IN DENNIS, MA, ADDRESS: 131 HOKUM ROCK ROAD, DENNIS, MA, PREPARED FOR: FORWARD, P.O. BOX 1174, S. DENNIS, MA," DATED JANUARY 10, 2019, PREPARED BY BAXTER NYE ENGINEERING & SURVEYING, A COPY OF WHICH IS ATTACHED HERETO AND INCORPORATED HEREIN AS A PORTION OF THIS EXHIBIT A.

FOR TITLE SEE NOTICE OF LEASE RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS IN BOOK 32201, PAGE 172.

POSSIBLE ENCROACHMENTS: △ (TYP.)

A. ALONG NORTH WESTERLY PROPERTY LINE ABUTTING ASSESSOR MAP 311, LOT 15. (BOAT, SHED, LANDSCAPING, ETC.)
B. ALONG NORTH EASTERLY PROPERTY LINE ABUTTING ASSESSOR MAP 311, LOT 48. (OLD FENCING, DEBRIS PILE)
C. DIRT PATH

TO: FRIENDS OR RELATIVES WITH AUTISM & RELATED DISABILITIES – F.O.R.W.A.R.D., INC., PO BOX 1174 DENNIS, MA 02660; FIRST AMERICAN TITLE INSURANCE COMPANY, ITS SUCCESSORS AND/OR ASSIGNS; THE COMMONWEALTH OF MASSACHUSETTS ACTING BY AND THROUGH THE DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT FOR ITSELF AND AS AGENTS FOR THE LENDERS: COMMUNITY ECONOMIC DEVELOPMENT ASSISTANCE CORPORATION, A BODY POLITIC AND CORPORATE, DULY ORGANIZED AND EXISTING IN ACCORDANCE WITH CHAPTER 40H OF THE MASSACHUSETTS GENERAL LAWS; THE TOWN OF DENNIS; AND THE INHABITANTS OF THE TOWN OF BARNSTABLE A MASSACHUSETTS MUNICIPAL CORPORATION KNOWN AS THE TOWN OF BARNSTABLE ORGANIZED UNDER A CHARTER ADOPTED PURSUANT TO MASS. CONST. AMEND. ART. 89 § 3 ON APRIL 11, 1989, 100 CAMBRIDGE STREET, SUITE 300, BOSTON, MA 02114

THIS IS TO CERTIFY THAT THIS MAP OR PLAT AND THE SURVEY ON WHICH IT IS BASED WERE MADE IN ACCORDANCE WITH THE 2016 MINIMUM STANDARD DETAIL REQUIREMENTS FOR ALTA/NSPS LAND TITLE SURVEYS, JOINTLY ESTABLISHED AND ADOPTED BY ALTA AND NSPS, AND INCLUDES ITEMS N/A OF TABLE A THEREOF. THE FIELD WORK WAS COMPLETED ON JUNE 2019.

DATE OF PLAT: AUGUST 2, 2019

8/7/19
SHANE M. MALLOY, PPLS MA #[illegible]
BAXTER NYE ENGINEERING AND SURVEYING
78 NORTH STREET
HYANNIS, MASSACHUSETTS, 02601

SURVEYORS DESCRIPTION:

BEGINNING AT A POINT ON THE EAST SIDELINE OF THE PARCEL BEING THE NORTHEAST CORNER OF THE PARCEL AT HOKUM ROCK ROAD
THENCE S 9 DEGREES 05' 24" E ONE HUNDRED-EIGHT FOUR AND 53/100 (184.53) FEET;
THENCE S 74 DEGREES 41' 41" W ONE HUNDRED-SIXTY TWO AND 35/100 (162.35) FEET;
THENCE S 72 DEGREES 17' 09" W TWO HUNDRED-SIX AND 22/100 (206.22) FEET;
THENCE S 78 DEGREES 54' 09" W TWO HUNDRED-TWENTY SEVEN AND 93/100 (227.93) FEET;
THENCE S 75 DEGREES 02' 28" W SEVENTY NINE AND 54/100 (79.54) FEET;
THENCE N 10 DEGREES 37' 48" W THREE HUNDRED-THIRTY SIX AND 67/100 (336.67) FEET;
THENCE N 80 DEGREES 19' 06" E ONE HUNDRED-THREE AND 85/100 (103.85) FEET;
THENCE N 85 DEGREES 57' 16" E EIGHTY AND 50/100 (80.50) FEET;
THENCE N 79 DEGREES 45' 58" E ONE HUNDRED-EIGHTY FIVE AND 73/100 (185.73) FEET;
THENCE N 87 DEGREES 57' 10" E ONE HUNDRED-FIFTY FIVE AND 01/100 (155.01) FEET;
THENCE N 89 DEGREES 58' 04" E SEVENTY ONE AND 48/100 (71.48) FEET TO THE SIDE LINE OF HOKUM ROCK ROAD;
THENCE ALONG THE SIDE LINE OF HOKUM ROCK ROAD ON AN ARC TO THE RIGHT WITH A NON TANGENT RADIUS OF EIGHT HUNDRED-SIXTY THREE AND 62/100 (863.62) FEET ONE HUNDRED-FIVE AND 08/100 (105.08) FEET TO THE POINT OF BEGINNING
CONTAINING 201,100 SQUARE FEET MORE OR LESS.

SCHEDULE B, PART I
EXCEPTIONS FROM COVERAGE
POLICY No.– 5011300-3060993a ◯ (TYP.)

1. ANY FACTS, RIGHTS, INTERESTS, OR CLAIMS THAT ARE NOT SHOWN IN THE PUBLIC RECORDS BUT THAT COULD BE ASCERTAINED BY AN INSPECTION OF THE LAND OR BY MAKING INQUIRY OF PERSONS IN POSSESSION OF THE LAND. (NOT PLOTTABLE)
2. ANY ENCROACHMENT, ENCUMBRANCE, VIOLATION, VARIATION, OR ADVERSE CIRCUMSTANCE AFFECTING THE TITLE, INCLUDING DISCREPANCIES, CONFLICTS IN BOUNDARY LINES, SHORTAGE IN AREA, OR ANY OTHER FACTS THAT WOULD BE DISCLOSED BY AN ACCURATE AND COMPLETE LAND SURVEY OF THE LAND, AND THAT ARE NOT SHOWN IN THE PUBLIC RECORDS. (NOT PLOTTABLE)
3. ANY LIEN, OR RIGHT TO A LIEN, FOR SERVICES, LABOR OR MATERIAL HERETOFORE OR HEREAFTER FURNISHED, IMPOSED BY LAW AND NOT SHOWN IN THE PUBLIC RECORDS. (NOT PLOTTABLE)
4. THE MORTGAGE, IF ANY, REFERRED TO IN ITEM 4 OF SCHEDULE A. (THIS EXCEPTION DOES NOT APPLY TO LOAN POLICIES). (NOT PLOTTABLE)
5. LIENS FOR TAXES AND ASSESSMENTS WHICH BECOME DUE AND PAYABLE SUBSEQUENT TO THE DATE OF POLICY AS A RESULT OF EITHER THE LAND OR THE USE THEREOF BEING CHARACTERIZED BY THE APPLICABLE TAXING AUTHORITIES AS FOR-PROFIT AND NOT THE CURRENT, NON-PROFIT, TAX-EXEMPT USE. (NOT PLOTTABLE)
6. IF THE INSURED PREMISES IS A CONDOMINIUM UNIT; COVENANTS, CONDITIONS, RESERVATIONS, EASEMENTS, LIENS FOR ASSESSMENTS, OPTIONS, POWERS OF ATTORNEY, AND LIMITATIONS ON TITLE, CREATED BY THE LAWS OF THE STATE OF THE INSURED PREMISES OR SET FORTH IN THE MASTER DEED OR DECLARATION OF CONDOMINIUM, IN THE RELATED BY-LAWS, IN THE DECLARATION OF TRUST, OR SITE PLANS AND FLOOR PLANS AS DULY RECORDED IN THE APPROPRIATE LAND RECORDS OFFICE AND AS THE SAME MAY HAVE BEEN LAWFULLY AMENDED, AND IN ANY INSTRUMENT CREATING THE ESTATE OR INTEREST INSURED BY THIS POLICY. (NOT PLOTTABLE)
7. ORDER OF TAKING BY THE TOWN OF DENNIS BOARD OF SELECTMEN DATED APRIL 29, 1983 RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS IN BOOK 1100, PAGE 286. (A PORTION PLOTTED HEREON)
8. DECISION BY THE TOWN OF DENNIS PLANNING BOARD DATED JULY 24, 2017 RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS IN BOOK 31183, PAGE 12 AS AFFECTED BY MODIFICATION DATED OCTOBER 10, 2018 RECORDED WITH SAID DEEDS IN BOOK 31668, PAGE 83. (NOT PLOTTABLE)
9. AFFORDABLE HOUSING RESTRICTION DATED AUGUST 2, 2019 GIVEN BY FRIENDS OR RELATIVES WITH AUTISM & RELATED DISABILITIES – F.O.R.W.A.R.D., INC. FOR THE BENEFIT OF THE COMMONWEALTH OF MASSACHUSETTS ACTING BY AND THROUGH THE DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT FOR ITSELF AND AS AGENT FOR THE FOLLOWING LENDERS: COMMUNITY ECONOMIC DEVELOPMENT ASSISTANCE CORPORATION, A BODY POLITIC AND CORPORATE, DULY ORGANIZED AND EXISTING IN ACCORDANCE WITH CHAPTER 40H OF THE MASSACHUSETTS GENERAL LAWS; THE TOWN OF DENNIS; AND THE INHABITANTS OF THE TOWN OF BARNSTABLE A MASSACHUSETTS MUNICIPAL CORPORATION KNOWN AS THE TOWN OF BARNSTABLE ORGANIZED UNDER A CHARTER ADOPTED PURSUANT TO MASS. CONST. AMEND. ART. 89 § 3 ON APRIL 11, 1989 AND OTHERS RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS ON AUGUST 2, 2019 IN BOOK 32201, PAGE 178. (NOT PLOTTABLE)

EXHIBIT A
POLICY No. – 5011300-3060993a

A CERTAIN PARCEL OF LAND LOCATED OFF HOKUM ROCK ROAD, DENNIS, MASSACHUSETTS, CONTAINING A TOTAL OF 4.616± ACRES, WHICH IS A PORTION OF THE LAND SHOWN ON TOWN ASSESSOR'S MAP 311 AS PARCEL 3 AND SHOWN ON A PLAN OF LAND ENTITLED "LEASE EXHIBIT PLAN IN DENNIS, MA, ADDRESS: 131 HOKUM ROCK ROAD, DENNIS, MA, PREPARED FOR: FORWARD, P.O. BOX 1174, S. DENNIS, MA," DATED JANUARY 10, 2019, PREPARED BY BAXTER NYE ENGINEERING & SURVEYING, A COPY OF WHICH IS ATTACHED HERETO AND INCORPORATED HEREIN AS A PORTION OF THIS EXHIBIT A.

FOR TITLE SEE NOTICE OF LEASE RECORDED WITH THE BARNSTABLE COUNTY REGISTRY OF DEEDS IN BOOK 32201, PAGE 172.

POSSIBLE ENCROACHMENTS: △ (TYP.)

A. ALONG NORTH WESTERLY PROPERTY LINE ABUTTING ASSESSOR MAP 311, LOT 15. (BOAT, SHED, LANDSCAPING, ETC.)
B. ALONG NORTH EASTERLY PROPERTY LINE ABUTTING ASSESSOR MAP 311, LOT 48. (OLD FENCING, DEBRIS PILE)
C. DIRT PATH

TO: FRIENDS OR RELATIVES WITH AUTISM & RELATED DISABILITIES – F.O.R.W.A.R.D., INC., PO BOX 1174 DENNIS, MA 02660; FIRST AMERICAN TITLE INSURANCE COMPANY, ITS SUCCESSORS AND/OR ASSIGNS; BLUEHUB LOAN FUND, INC., 10 MALCOLM X BOULEVARD, ROXBURY, MA 02119;

THIS IS TO CERTIFY THAT THIS MAP OR PLAT AND THE SURVEY ON WHICH IT IS BASED WERE MADE IN ACCORDANCE WITH THE 2016 MINIMUM STANDARD DETAIL REQUIREMENTS FOR ALTA/NSPS LAND TITLE SURVEYS, JOINTLY ESTABLISHED AND ADOPTED BY ALTA AND NSPS, AND INCLUDES ITEMS N/A OF TABLE A THEREOF. THE FIELD WORK WAS COMPLETED ON JUNE 2019.

DATE OF PLAT: AUGUST 2, 2019

8/7/19
SHANE M. MALLOY, PPLS MA #[illegible]
BAXTER NYE ENGINEERING AND SURVEYING
78 NORTH STREET
HYANNIS, MASSACHUSETTS, 02601

BAXTER NYE

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Hyannis, Massachusetts 02601

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Fax – (508) 771-7622
www.baxter-nye.com

STAMP

STAMP

8/7/19

CONSULTANT

ARCHITECT

PREPARED FOR:
FORWARD
PO Box 1174,
South Dennis, MA 02660

PROJECT TITLE
Hokum Rock Home
131 Hokum Rock Road
Dennis, MA

NO	BY	DATE	DESCRIPTION

SHEET TITLE
ALTA/NSPS
LAND TITLE SURVEY

SHEET NO
C2.0

DATE: AUGUST 02, 2019

30 0 30 60
SCALE IN FEET
SCALE: 1"=30'
DRAWN BY: SM CHECKED BY: SM
JOB NO: 2017-098 FILE: 2017-098 ALTA.dwg

SHEET 2 OF 2

Friends Or Relatives With Autism & Related Disabilities

2021
HOUSING NEEDS STUDY

May 13, 2021

Prepared by

Empower Success Corps

Generously supported by a microgrant from Barnstable County Economic Development Council

County of Barnstable Massachusetts

Cape Cod Commission

176 Federal Street, Suite 5C, Boston, MA 02110 | 617-357-5550 (MA) 603-926-0752 (NH) | empowersuccesscorps.org

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EXECUTIVE SUMMARY

BACKGROUND

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. In June 2020, FORWARD successfully completed a home building project, FORWARD at the Rock, on Town-owned land in Dennis, Massachusetts. The facility provides affordable, supportive housing for eight adults with severe autism and related disabilities and is fully occupied by residents eligible for state financial assistance.

The ground-lease agreement with the Town of Dennis allows for the development of an additional eight units on the property to provide homes for developmentally disabled individuals. To assess the need for such housing, FORWARD engaged the non-profit consulting firm Empower Success Corps (ESC) in December 2020. In undertaking the study, ESC focused on the following as it relates to the developmentally disabled population on Cape Cod and the Islands:

- Determining the need for various types of supported affordable housing
- Assessing the current supply of affordable housing
- Gauging the housing needs of the developmentally disabled population as understood by their caregivers, service providers, and advocates
- Ascertaining the expert opinions of the Massachusetts Department of Developmental Services.

SUMMARY OF FINDINGS

- Service Provider surveys and interviews indicate that *all* forms of supportive housing are needed for the developmentally disabled population
- The need for "extremely affordable" housing at 30% of Area Medium Income (AMI) is critical.
- The shortage of affordable housing is acute. Public Housing Authority surveys show a scarcity of units for all applicants, with wait-lists numbered in the "hundreds."
- The need for supportive and supported housing is *growing* for adults with developmental disabilities and for those on the autism spectrum.
- The Department of Developmental Services favors a housing model that provides for a range of intermittent at-home supports enabled by technology, as well as in-person assistance.
- Interviews with Service Providers unequivocally express that the shortage of affordable housing is a barrier for hiring qualified personnel to care for their Cape Cod clients.

METHODOLOGY

In producing the Report, ESC Consultants worked collaboratively with FORWARD representatives over a five-month period. The basis for the findings was information gathered from customized surveys, interviews with key stakeholders, and review of relevant literature, reports, and data. Surveys were sent to local service providers, private special education schools, special education departments in local public high schools, and local public housing authorities. In-depth interviews were conducted with parents of young adults diagnosed with Autism Spectrum Disorder, disability advocates, service providers, and a virtual meeting was held with senior officials of the Department of Developmental Services.

INTRODUCTION

Friends Or Relatives With Autism & Related Disabilities is an independent 501(c) 3 nonprofit organization founded in 2014 by a group of concerned Cape Cod citizens with a mission to build "affordable supportive homes that enable adults with autism and related disabilities to thrive in an appropriate, safe and healthy environment."

BACKGROUND

DEVELOPING FORWARD AT THE ROCK

Central to its mission, in June 2020, FORWARD successfully completed a home building project, FORWARD at the Rock, in the Town of Dennis, Massachusetts. The homes are designed as a duplex, with two houses side-by-side, each with four bedrooms and separate common areas and a shared courtyard. The houses provide affordable, supportive and permanent homes for eight adults with severe autism and related disabilities. Each home is fully occupied by residents receiving state financial assistance for rent and services, and they are fully staffed by Cape Abilities, a leading Cape Cod nonprofit service provider. The homes were specifically designed for adults ages 22 years and older who require around-the-clock service and are staffed with a minimum ratio of one staff member per four residents. All areas of the homes are wheelchair accessible and are designed to provide lifelong homes that accommodate residents as they age. FORWARD at the Rock is part of a residential neighborhood, just one mile from Dennis village and convenient to shopping, recreation, public beaches, day programs and other amenities.

Success in completing FORWARD at the Rock proved the expertise of the organization in raising public and private funding and demonstrated that a small, committed nonprofit developer can successfully build affordable housing that meets the needs of this underserved population. Construction was completed on time and on budget.

FINANCING FORWARD AT THE ROCK

The project was financed by private, federal, and local sources:

- $1,040,000 from the Community Preservation Act programs of six local Cape Cod towns (Dennis, Barnstable, Yarmouth, Brewster, Chatham and Mashpee)
- 99-year lease of 4.6 acres of land at an annual rent of $1.00 from the Town of Dennis
- $1,000,000 in funding through the state's Facilities Consolidation Fund and the National Housing Trust Fund supported by a letter from the Massachusetts Department of Developmental Services endorsing the project
- Community giving by individuals, businesses, and foundations
- Mortgage loan from BlueHub, a nonprofit Community Development Financial Institution

FORWARD AT THE ROCK MANAGEMENT

FORWARD is the owner of the FORWARD at the Rock buildings and retains financial responsibility and oversight of the property, including capital improvements and replacements. Cape Abilities, a well-known and respected nonprofit based in Hyannis, manages and maintains the homes and provides care for the residents through a Sublease and Management Agreement with FORWARD and a service contract with the Department of Developmental Services.

LOOKING TOWARD THE FUTURE: HOUSING NEEDS STUDY

The ground lease agreement with the Town of Dennis allows for the development of eight additional housing units on the property for individuals with autism and related disabilities. To assess the need for such housing, FORWARD engaged the non-profit consulting firm Empower Success Corps (ESC) in December 2020. In undertaking the study, ESC focused on the following as it relates to the developmentally disabled population on the Cape and the Islands:

- Determining the need for various types of supported affordable housing
- Assessing the current supply of affordable housing
- Gauging the housing needs of the developmentally disabled population as understood by their caregivers, service providers, and advocates
- Ascertaining the expert opinions of the Massachusetts Department of Developmental Services

FINDINGS

SUMMARY

- Our Service Provider surveys and interviews indicate that all forms of supportive housing are needed for the developmentally disabled population, and the need for "extremely affordable" housing is critical. 80%+ of those identified with developmental disabilities are not gainfully employed, and those who work earn an estimated $16,000 to $23,000 per year. [1]

- The shortage of affordable housing is acute. Our Public Housing surveys show a shortage of units for all applicants, and the 2017 Cape Cod Commission report notes that Barnstable County is short of 4,441 affordable housing units to meet the target Safe Harbor 10% requirement under MA GL Chapter 40B.[2] Dennis has 390 units on its Subsidized Housing Inventory list, below the goal for achieving the 10% requirement under the law.[3]

- The need for supportive and supported housing is growing for adults with developmental disabilities and for those on the autism spectrum. By age eight, 1 in 54 children are identified with Autism Spectrum Disorder, and each year over 50,000 children with autism reach adulthood.[4] The Massachusetts Department of Developmental Services (DDS) reports that the Cape Area Office receives 6-8 new clients each month who qualify for services. [5]

- DDS officials note that a housing model that provides for a range of intermittent at-home supports enabled by technology, as well as in-person assistance, in a setting that encourages a connection

[1] Parent caregivers of adult children with disabilities

[2] Cape Cod commission, Regional Housing Analysis Barnstable County, 2017, p.15

[3] See https://www.mass.gov/doc/subsidized-housing-inventory/download

[4] Autism Speaks. https://www.autismspeaks.org/autism-statistics-asd

[5] Meeting with DDS Officials March 19, 2021.

with the community will provide the kind of flexibility this population needs to be successful living independently.

- Interviews with Service Providers unequivocally express that the shortage of affordable housing is a barrier for hiring qualified personnel to care for their Cape clients; thus, the solution for providing housing for the developmentally disabled population should be considered in tandem with expanding the stock of workforce housing. The critical need for workforce housing is confirmed by local reports. A Housing Assistance Corporation 2018 study notes that high housing costs "are driving the local workforce away."[6]

FACTS & FIGURES BEHIND THE SUMMARY

The big picture reveals that the Commonwealth of Massachusetts is estimated to have a population of approximately 188,000 in the 18 to 64-year-old age range who experience cognitive difficulty. Nearly 5,000 live in Barnstable County, and of that group over 3000 have difficulty living independently, documenting the need for supports for this segment of the population.

	Massachusetts	Barnstable County	Dukes County	Nantucket County
Total Population	6.7MM	210,000	17,000	11,000
Population Ages 18-64	4.3MM	116,000	10,000	7,100
Cognitive Difficulty 18-64	188,000	4,900	165	365
Self-care difficulty Ages 18-64	65,000	1600	153	49
Independ. living difficulty Ages 18-64	142,000	3,300	192	155

Source: American Community Survey. Table ID S1810, Data Set ACSST5Y2019, ACS 5-Year Estimates Subject Tables, Vintage 2019

It is this very population that requires affordable housing solutions:

- An estimated 81% of developmentally disabled adults 18 and over do not have a paid job in the community.[7]
- Even those who work and receive Social Security Income still cannot afford market rents given monthly earnings of between $1300 and $2000. Parent advocates tell us that a typical scenario is a developmentally disabled individual receiving about $750 per month from Social Security Income and working a part-time job of 10-20 hours per week at the Massachusetts minimum wage of $13.50 per hour.

[6] Housing Assistance Corporation, "Housing on Cape Cod: The High Price of Doing Nothing" 2018, p.4

[7]2016-2017 National Core Indicators Survey.

- At a yearly income between $16,000 and $23,000, these individuals fall into the "extremely low" and "very low-income" categories of housing affordability, earning between 26 and 37 per cent of the estimated 2021 Barnstable County Area Median Income of $62,510 for a 1-person household. [8]

PERSPECTIVES FROM THE DIRECT CARE SERVICE PROVIDERS

Service providers and disability advocates know the affordable housing problem well. Barnstable County's key non-profit service providers - Cape Abilities, Community Connections, and Cape Organization for the Rights of the Disabled - collectively serve 763 clients. Their executives tell us that:

- they have clients who would immediately take advantage of more affordable housing if it were available
- the cost and lack of housing on the Cape makes rental payments unaffordable even to holders of Section 8 vouchers
- a range of affordable housing options are all deemed "high need" including:
  - Group Homes
  - Apartments for Shared Living, including Adult Foster Care
  - Independent Living with varying levels of supports and supervision
  - Independent Living with caretaker apartment

"…with supports, many individuals with ASD can live in the community if affordable housing is available."

Housing Sub-Committee of the Massachusetts Autism Commission, 2017

"Availability, accessibility, and affordability – these are the critical housing needs for our clients." David Botting, President & CEO, Community Connections

PERSPECTIVES FROM THE MA DEPARTMENT OF DEVELOPMENTAL SERVICES

Working closely with the developmentally disabled population is the Massachusetts Department of Developmental Services (DDS). With a mission "to enhance opportunities to become fully engaged members of their community," DDS is the most important source of public support for individuals with intellectual and developmental disabilities. The Cape Cod and the Islands Area Office Director and DDS senior managers tell us that:

- The Department gives highest priority to clients in immediate, urgent need.
- Cape Area DDS office has an Active Consumer list of 1,403 clients.
- Cape Area DDS has an average of 54 **new** clients per year who are eligible for services.[9]

[8] https://www.huduser.gov/portal/datasets/il/il2021/2021summary.odn. HUD determines that 1-person household median income is equal to 70% median income of 4-person household.

[9] This number is derived from 3-6 newly qualified clients per month.

In terms of the Department's outlook for on-going services, they see a need for "intermittent at-home" support as a means of assisting those who live independently. Moreover, DDS is promoting supportive technology and unveiled their "Technology Forward" initiative in April 2021. In addition to favoring housing that is connected to the broader community, the Department favors housing that incorporates wired infrastructure for supportive technology.

"My home and community-based programs are in desperate need of housing. For both groups there is no affordable housing available on the Cape. A Shared Living option with three- bedroom units, housing two individuals and a caretaker, would mean that some people could move out of Group Homes and into Shared Living which would open new beds in Group Homes. We have people with Section 8 vouchers who can't find a place to live, and we support individuals with autism who will soon be ready to live independently with supports. We just need places for them to live." -- Amanda Dana, Director of Home and Community-Based Supports.

PIPELINE OF FUTURE DEMAND

While the Service Providers' perspective is grounded in the present, the survey of high schools, private special education and public schools, with six respondents, provides a look into the future. The two special education private schools –Riverview School and Latham School - total approximately 40 graduates annually, about 25 percent of whom may stay on the Cape. Officials at these schools indicate that after graduating, most of these students will need significant or moderate living support. The public high schools average 30 Individual Education Plan (IEP) graduates annually, with an over-all average of 10 students estimated to require moderate or minimal support after leaving the school system at age 22.

Speaking with five parents of teenage youth living at home and attending school enriched our perspective. Their children will age out of the services mandated by the education system and potentially become available for adult services within a five-year time frame. Most of the families believe that with sufficient training and supervision, their children could live independently in supported housing, either alone or with a roommate. The consensus hope is that their adult children would be able to work at a job they found rewarding, probably on a part time basis, and have a satisfying social life, as well. Finally, augmenting these future school graduates is the population of developmentally disabled adults who live with aging parents, all of whom will need to find housing when their parents are no longer able to care for them.

PUBLIC HOUSING AS A SOURCE OF AFFORDABLE HOUSING SUPPLY: EXTREMELY LIMITED

As noted earlier, affordable housing is in extremely short supply. So, too, is Public Housing. There are 13 Public Housing Authorities on Cape Cod and Islands. The nine for which we have information manage over 1,800 units, with the Town of Barnstable accounting for more than half of the total. The estimates of the size of the waiting lists for these units far exceeds the supply. Moreover, of the reported 1844 public housing units only 237 were reserved for citizens with any form of disability.

Housing Authority administrators are overwhelmed with demand for these units. When asked which population – Elderly, Disabled, Families, etc. – was most in need of affordable housing, the systematic response was that all were in dire need of assistance.

HOUSING CHALLENGES IN TOWN OF DENNIS

The Dennis Housing Production Plan - Update 2020 articulates several broad findings. The report tells us that:

- Nearly 18 per cent of the Dennis population reports having one or more disabilities, a higher rate than both Barnstable County (13.2 per cent) and the State (11.6 per cent).[10]

- Special consideration should be given to the needs of older residents, residents with disabilities, and those living in poverty, all of whom Dennis has in relatively large numbers.
- In 2018, Dennis Median Household Income was the second lowest on Cape Cod.
- Sixty-four percent of the households in Dennis pay more than 30 per cent of their income on their housing costs – the definition by HUD of "housing cost burdened," paying more than 30% on housing with subsequent difficulty affording necessities such as food, medical care, and other needs.[11]

These findings paint a picture of a serious mismatch between housing availability and housing affordability in Dennis – a condition that exists throughout the Cape – and rightly notes that the mismatch may well affect the disabled population more severely. In seeking to address the problem, the *Dennis Housing Production Plan 2020 Update* notes that the Town will need to produce 38 units of affordable housing annually (0.5 per cent of its housing stock of 7,600 year-round units) to meet the threshold one-year Safe Harbor exemption from MA GL Chapter 40B.[12] A project in Dennis, such as the one proposed by FORWARD, that meets the housing needs of the developmentally disabled can be part of the solution. In fact, the *Housing Production Plan* favorably cites FORWARD at the Rock as a recent affordable housing development "success," complimenting the project design as aligning with local preferences. Moreover, during "village conversations" held while formulating the *Plan*, participants mentioned that providing "more housing options for people with disabilities" might be a helpful solution to the housing shortage.[13]

"… the issue of affordable housing in Dennis cannot be separated from the issue of disability rights." The Dennis Housing Production Plan – Update 2020

METHODOLOGY

The project was conducted by a four-member consulting team from Empower Success Corps (ESC) in consultation with a Working Group from FORWARD. Members of the FORWARD Working Group included Kathy Ohman, Board President; Bob Samoluk, Board Clerk; and David Kaplan, Executive Director. The ESC team consisted of Bruce Berzin, Louise Borke, Susan Houston, and Marietta Joseph, Team Lead. Work began at the initial meeting December 17, 2020 and continued at scheduled bi-weekly meetings beginning January through the end of May 2021.

[10] Town of Dennis Housing Production Plan Update 2020, p.17

[11] https://www.google.com/search?client=safari&rls=en&q=www.HUD+Defining+Housing+Affordability&ie=UTF-8&oe=UTF-8

[12] Town of Dennis Housing Production Plan, p.1 & 2

[13] Ibid, p.60 &61.

TASK 1

IDENTIFY SOURCES

Identify sources that might provide reliable information on the need for affordable housing for adults with developmental disabilities.

DEMAND FOR SUPPORTIVE AFFORDABLE HOUSING

- *Service Providers on Cape Cod supporting the population of individuals with diagnoses of developmental disabilities, including autism spectrum disorder*. These non-profit organizations provide residential or day services, job training and other supports to the local Cape Cod population and, accordingly, have experience with all age groups, and are supporting Department of Disability Services clients through their Individual Support Plans.

- *Special Education Schools, Public High Schools on Cape Cod and Islands* providing Individual Education Plans (IEP) to students in transition to adult living. These schools would provide information on the stream of young adults who in the future will require supportive housing.

- *Parents with adult children living at home*, specifically parents who are concerned that as they age, they will be unable to continue caring for their adult children, parents who are currently seeking long-term housing for their loved ones, and parent advocates for the developmentally disabled.

- *Massachusetts Department of Developmental Services* office that serves the Cape and the Islands.

- *General Information Sources*, University of Massachusetts Medical Center and Eunice Kennedy Shriver Center that recently authored a study on Children and Youth with ASD/DD; the UMass Donahue Institute, a research and consulting arm of the University of Massachusetts; and advocacy groups such the Asperger/Autism Network (AANE), Cape Cod Commission.

SUPPLY OF AFFORDABLE HOUSING

- *Local Public Housing Authorities (PHAs)*. Cape Cod and the Islands has 13 PHAs which own or manage public housing and manage the distribution of so-called “mobile” vouchers that enable low-income individuals to access housing at below market rates.

- *General Information Sources*. Dennis Housing Production Plan, MassHousing, Community Development Organizations, Advocacy groups such as Community Development Partnership, Housing Assistance Corporation, Department of Housing and Community Development.

TASK 2

REVIEW GENERAL INFORMATION SOURCES

The ESC team reviewed the rich trove of information and reports from general information sources noted above and consulted with housing specialists from the UMass Donahue Institute regarding data from the American Community Survey.

TASK 3

DEVELOP, TEST, AND DISTRIBUTE QUESTIONS

The ESC Team, with the input of the FORWARD Working Group, developed questions and considered the format for securing responses from the various groups identified above.

- Service Providers: Thirteen questions with multiple sub-parts were developed with the goal of securing aggregate information about the Service Provider client population. In broad terms, the questions intended to capture the size and characteristics of their client base, current living arrangements, and current and future housing needs. The questions were tested by two Service Provider organizations well-known to FORWARD, and after editing, were incorporated into Survey Monkey platform. Executive Director David Kaplan distributed the questionnaire to ten Providers working on the Cape with an introduction requesting participation in an important project to evaluate the need for housing for the Developmentally Disabled. (Appendix I) After distribution and follow-up calls, five responses were received and aggregated, representing 763 clients. Follow-up interviews were held with two of the Service Providers, Cape Abilities and Community Connections.

- Schools: School administrators were asked three questions requesting the recipient's participation. These questions focused on the number of students with Individual Education Plans (IEP) who graduate from the institution each year, the severity of their disability, and an estimate of the type of housing that would be most appropriate for these individuals if not living at home with parents. ESC Consultants sent the questions to ten school administrators either known to FORWARD or to contacts identified through school departments. An introduction to the email provided information about FORWARD and the Survey Project. (Appendix II) Multiple follow-up calls were made and six responses were received and aggregated.

- Parents: Parents of young adults and teenagers known to FORWARD personnel were interviewed via telephone by ESC consultants and Board president Kathy Ohman. Five parents responded. (Appendix III)

- Public Housing Authorities: Thirteen local Public Housing Authorities were asked eight questions focusing on the number of units they owned or managed, how many reserved for individuals with disabilities, how many on waitlists for these units, and similar questions about their voucher programs. The questions were tested for suitability with a volunteer Public Housing Authority Executive Director. After editing, questions were incorporated into the Survey Monkey platform and sent to thirteen local Public Housing Authorities (PHAs) with an introductory email (Appendix IV). Of note, PHAs designate individuals within the general category of "disabled" (no distinction for developmentally disabled) and include this population in the same category as “elder”- age 60 for state housing and age 62 for federal assistance. After follow-up calls, of the 13 Survey Monkey inquiries sent, eight responses were received and aggregated.

TASK 4:

ANALYZE AND SYNTHESIZE INFORMATION FROM CUSTOMIZED SURVEYS, INTERVIEWS, AND LITERATURE REVIEW

In a collaborative and iterative process with the Working Group, the ESC Team developed key findings that form the basis of this report.

APPENDICES

APPENDIX I Outreach to and Survey of Local Service Providers

APPENDIX II Outreach to and Survey of Local Public and Specialty High Schools

APPENDIX III Outreach to Parents of Children with Developmental Disabilities

APPENDIX IV Outreach to and Survey of Local Public Housing Authorities

APPENDIX I

SERVICE PROVIDERS CONTACTED

Best Buddies
Cape Abilities
Community Connections
Cape Organization for the Rights of the Disabled (CORD)
Esprit Affordable Services
Kennedy-Donovan Centers
Living Independently Forever, Inc. (LIFE)
May Institute
North East Educational and Developmental Support Center (NEEDS)
Toward Independent Living and Learning, Inc. (TILL)

SAMPLE EMAIL TO RECIPIENTS
Dear [Recipient]:

We hope you will lend your knowledge and expertise to help us assess the affordable housing needs of adults on the Cape and Islands with developmental disabilities, particularly those with autism. As you know, FORWARD recently opened eight newly constructed units of supportive housing in Dennis, and we are committed to building additional housing for those with developmental disabilities. We are now looking toward the future, and to that end, we respectfully ask you or your designated staff to add your knowledge to the effort by completing a survey that will help us assess and quantify the need. The survey requires some modest preparation, so we are attaching a preview so you can review the questions beforehand to simplify taking the survey when you click on the link.

We appreciate your participation in this important project!

SURVEY MONKEY QUESTIONS

Please tell us
Your Organization____________
Your Name___________
Your Title_________
Contact Information *(email and phone number*)

We would like to understand the "big picture" about the clients you serve.

1. How many clients do you currently serve on Cape Cod and the Islands? ________

2. How many of these clients are in
   a. Residential Programs Only_____
   b. Day Programs Only_____
   c. Both_________

3. What types of disabilities brought your clients to your organization? (Check all that apply)

a. Development Disabilities (excluding Autism)
b. Development Disabilities (including Autism)
c. Autism Spectrum Disorder (ASD) only
d. Other (please specify)

We would like to learn more about your clients with Developmental Disabilities.

4. Of your clients with Developmental Disabilities, approximately **how many** are on the Autism Spectrum? (Please check category)
   a. Fewer than 25
   b. 25-50
   c. 51-75
   d. 75-100
   e. Over 100

5. Can you characterize the degree of severity, and let us know **how many** of your ASD clients fall into each category?
   a. Mild
   b. Moderate
   c. Severe

6. Can you tell us how many of your ASD clients are in your
   a. Residential Programs Only_____
   b. Day Programs Only____
   c. Both _____

7. How many of your clients with ASD fall within each age range? (Please specify number within range)
   a. 18-20
   b. 21 to 34
   c. 35 to 49
   d. 50 to 64
   e. 65 and older

8. How do they identify by gender? (Please specify number)
   a. Male
   b. Female
   c. Non-binary

9. Where do your clients with ASD live? (Check all that apply)
   a. Cape Cod
      Which towns?____
   b. Nantucket & Martha's Vineyard
   c. Southeastern MA (Plymouth County)
   d. Outside of the Cape, Islands, and SE Massachusetts

We would like to understand the housing needs of your clients

10. Can you tell us about the living arrangements of your clients with developmental disabilities? (Please specify number)
    a. Group Home or Other Congregate Care
    b. At home with family members
    c. Shared Living (including Adult Foster Care)
    d. Living Independently
        i. Alone, with no in-house supports
        ii. Alone, but with varying levels of in-house supports
    e. Other (please specify________________________________

11. Can you quantify the number of adult clients you have now who are homeless, housing insecure, or in inadequate housing situations? (Please check or circle response)
    a. Fewer than 10
    b. 10-30
    c. 31-50
    d. Over 50
    e. Not Sure

12. Do you have clients who might immediately take advantage of more appropriate and affordable living situations if they were available on the Cape?
    a. Yes…. If so, what type?____
    b. No
    c. Not sure

…and toward the future

13. What do you perceive to be the biggest housing need on Cape Cod for those on the Autism Spectrum or other Developmental Disabilities? (Open Question)

14. If you could wave a magic wand and create housing for 8 adults with Autism, what type of housing do you believe would fulfill the greatest need? (Rank each as "High Need" "Moderate Need" "Low Need")
    a. Group Home (supportive housing w/ round-the-clock staffing)
    b. Apartments for Shared Living Arrangements
    c. Independent living with varying levels of supports and supervision
    d. Independent living with few or no supports (caretaker/superintendent apartment)
    e. Other – please specify____

15. Does the Cape's lack of affordable work force housing affect your ability hire qualified staff?
    a. Yes
    b. No
    c. Not sure

16. Is there anything you would like to add regarding the housing needs of adults with Development Disabilities on the Cape? (Open Ended)

    Thank you for completing the survey. We appreciate your time and effort! Your responses will be shared only with FORWARD and ESC, and we will keep you posted on further developments.
    ---The FORWARD-ESC Team

APPENDIX II

HIGH SCHOOLS CONTACTED

Schools Special Education

Riverview

Latham

High Schools - Public

Barnstable	Monomony Regional
Bourne	Nauset Regional
Dennis-Yarmouth Regional	Sandwich
Falmouth	Martha s Vineyard Regional
Mashpee	Nantucket

SAMPLE EMAIL TO RECIPIENTS

Dear [Recipient]:

I am a consultant with Empower Success Corps (ESC), a nonprofit consulting group. We are working with FORWARD (Friends or Relatives with Autism and Related Disabilities) on a Market Survey to evaluate the need for appropriate, affordable housing on the Cape and Islands for young adults with developmental disabilities and, more specifically ASD. Your experience at [NAME] High School and input on this issue will be very helpful to our work. Please answer the three brief questions below and return via email.

SCHOOL SURVEY QUESTIONS

We would like to gather information about the future needs of the students with Developmental Disabilities and/or Autism Spectrum Disorder currently in your system. Specifically, we would like your projection about how many of these students will need and/or want to live independently from their families in the future.

We greatly appreciate your response.

1. How many students with an Individual Education Plan (IEP) enrolled in your school graduate each year? __
   (a) How many of these students are on the autism spectrum? _
2. In your judgment, how many of these individuals will be able to live independently of their families after they turn age 22? __
3. What type of housing support will be most appropriate for these individuals if they are not living with their families?

Specifically, how many may require:

Significant support___

Moderate support____

Minimal support ____

APPENDIX III

SAMPLE EMAIL TO PARENTS OF CHILDREN WITH DEVELOPMENTAL DISABILITIES

Dear [XXXX]

I am an ESC Consultant. As the Board Chairperson at FORWARD has mentioned to you, Empower Success Corps (ESC), a nonprofit consulting group, is working with FORWARD on a Market Survey to evaluate the need for appropriate, affordable housing on the Cape and Islands for adults with developmental disabilities and, more specifically ASD. Your experience and input on this issue will be very helpful to our work.

Would you let me know when during this coming week you would be available for a telephone interview lasting about 20 minutes?

Thank you in advance for your assistance on this important project.

PARENT SURVEY QUESTIONS

Age of your child_____

Current living situation_____

DDS Status:

Priority 1______

Other DDS_____

Other agency involvement, (include school)______

No agency involvement ________

Where do you see your child living?

In 5 years___________________

In 10 years__________________

Are you on a Public Housing Authority wait list?

APPENDIX IV

PUBLIC HOUSING AUTHORITIES CONTACTED

Barnstable
Bourne
Brewster
Chatham
Dennis
Falmouth
Harwich
Mashpee
Orleans
Provincetown
Sandwich
Yarmouth
Duke's County

SAMPLE EMAIL TO RECIPIENTS

Dear [Executive Director]:

FORWARD - Friends Or Relatives With Autism & Related Disabilities is a nonprofit charitable organization, founded in 2014 for the purpose of building homes for adults with Developmental Disabilities.

ESC, Empower Success Corps, is a nonprofit consulting organization, whose mission is to assist other nonprofits. Its consultants are volunteers. FORWARD has retained Empower Success Corps (ESC) to evaluate the need for and availability of housing on the Cape and Islands for adults with Handicaps or Disabilities.

I am writing in the hope that you might be able to spend a few minutes responding to several questions that would assist FORWARD in evaluating the need for housing for individuals with Autism and Developmental Disabilities. The survey does not ask for any confidential or sensitive information. Aside from your contact information, there are only eight questions. Although our client, FORWARD, serve individuals with Developmental Disabilities, the Questionnaire only seeks information relating to general Handicaps or Disabilities.

The link to the Survey Monkey Questionnaire follows

PUBLIC HOUSING AUTHORITY SURVEY QUESTIONS

1. How many housing units does your Authority own or manage?
    a. How many applicants are on the waiting list?

2. How many, if any, of these units are reserved for citizens with:
    a. Disabilities
    b. How many such applicants are on the waiting list for these units

3. How many total outstanding portable vouchers (Federal Sect. 8, State MRVP plus others) does your authority administer?
    a. How many of these are held by citizens with Disabilities?

b. How many citizens are on the wait list to receive such portable vouchers?
c. How many on the wait list have Disabilities?

4. Does your Authority have plans for increasing any of forms of housing that you now manage in 2021 or 2022? Y/N

5. If so, for how many units?
    a. General purpose
    b. Reserved for Disabilities

6. Among the forms of housing managed by the Housing Authority, what population do you perceive to represent the largest need on the Cape? e.g. Elderly, Physically Disabled, Developmentally Disabled etc.

7. Have you turned away people with Disabilities due to lack of available housing units? Y/N

ACKNOWLEDGMENTS

WE THANK THE FOLLOWING FOR THEIR TIME AND INSIGHTS DURING INTERVIEWS.

Andrea Aldana
Director of Housing Advocacy
Community Development Partnership

Carrie Bernstein
Research Manager
State Data Center Manager
Economic and Public Policy Research
UMass Donahue Institute

Tim Buhler
Executive Director
Orleans Housing Authority

Michelle Cantara
Co-Director Adult Services
The Asperger/Autism Network

Amanda Dana
Director of Home & Community-Based Support
Cape Abilities

Nancy Friend
Executive Director
Dennis Housing Authority

Laura Gallant
Community Resource Specialist, Northeast Region
Department of Developmental Services

Joe Krajewski
Chief Operating Officer
Community Connections

Allen McLennan
Cape Cod Village
Chairman
Affordable Housing Trust Board (2020)

Michael McNally
Research Analyst
Economic and Public Policy Research
UMass Donahue Institute

Bernard McNamara
Director of Pupil Services
Sandwich School District

Michael Scarpellini
Director of Programs
Cape Abilities

Cathy Taylor
Director of Services
Cape Organization for Rights of the Disabled (CORD)(delete extra space above Kathy Titus)
Kathy Titus
Director of Vocational and Transition Services
Riverview School

With special thanks to the Department of Developmental Services:
Victor Hernandez
Deputy Assistant Commissioner

Richard O'Meara
Regional Director Southeast

Richard Cavicchi,
Area Director Cape Cod & the Islands

LIST OF PUBLIC RESOURCES

BARNSTABLE & DUKES COUNTIES SOURCES

- Cape Cod Commission, Regional Housing Market Analysis and 10-Year Forecast of Housing Supply and Demand for Barnstable County, Mass. 2017
  - https://www.capecodcommission.org/our-work/housing-market-analysis/

- Cape Cod Comprehensive Economic Development Strategy (CEDS) 2019-2023
  - https://www.capecodcommission.org/our-work/ceds

- Dennis Housing Production Plan Update 2020 to 2017 Plan
  - https://onedrive.live.com/?authkey=%21ALR1yJfFwD8Vyx8&cid=9E9AB5C3A5C1C962&id=9E9AB5C3A5C1C962%217884&parId=9E9AB5C3A5C1C962%217883&o=OneUp

- Housing Assistance Corporation, Housing on Cape Cod: The High Cost of Doing Nothing, 2018
  - https://secureservercdn.net/104.238.71.250/hzu.dec.myftpupload.com/wp-content/uploads/2019/06/HAC-Housing-on-Cape-Cod.pdf

- The Island Autism Group – Island Autism Group; Three-Year Business Plan, June 2020
  - https://islandautism.org/wp-content/uploads/2020/09/island-autism-plan-09122020.pdf

US DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT – HUD

- Defining Housing Affordability
  - https://www.huduser.gov/portal/pdredge/pdr-edge-featd-article-081417.html

- Department of Housing and Community Development Chapter 40B Subsidized Housing Inventory (SHI) as of December 21, 2020*
  - https://www.mass.gov/doc/subsidized-housing-inventory/download

- FY 2020 Income Limits – HUD User
  - https://www.huduser.gov/portal/datasets/il/il20/FAQs-20.pdf

- FY 2020 Income & Rent Limits for 19 MA Income Limit Areas
  - https://www.masshousingrental.com/portal/server.pt/document/15608/2020_income___rent_limits_for_19_massachusetts_income_limit_areas`

VARIOUS MASSACHUSETTS GOVERNMENTAL UNITS

- Important Transition Information Every Family Should Know; April 2015, Massachusetts Department of Developmental Services
  - https://www.mass.gov/files/documents/2016/07/vy/may2015-transition-sheets.pdf

- Massachusetts Healthy People 2020 Autism Roadmap Report: Understanding Needs & Measuring Outcomes, University of Massachusetts Medical Center and Eunice Kennedy Shriver Center.
  - https://shriver.umassmed.edu/wp-content/uploads/2020/07/MA-HP2020-Autism-Roadmap-Report-FINAL_tagged.pdf

- Mass. Dept. of Housing and Community Development 2019 Analysis of Impediments to Fair Housing Choice; UMASS Donahue Institute
  - https://donahue.umass.edu/our-publications/2019-analysis-of-impediments-to-fair-housing-choice

- Massachusetts State Plan for Independent Living, (SPIL) 2021-2023; Part B Independent Living Services
  - https://masilc.org/wp-content/uploads/2021/01/Massachusetts_SPIL_2021-2023_final_approved-3.pdf

- Supportive Housing Currently Available to People with ASD in Massachusetts, Prepared for Housing Sub-Committee of Massachusetts Autism Commission Technical Collaborative, June 2017
  - https://www.mass.gov/files/documents/2017/09/zr/housing-survey-2017.pdf

- Technology Forward Initiative, MA Department of Developmental Services, April 2021
  - https://www.mass.gov/doc/dds-technology-forward-initiative-april-2021/download

OTHER SOURCES

- American Community Survey 5-Year Data (2009-2019)
  - Table ID S1810, Data Set ACSST5Y2019

- “The Challenge of Aging With Autism”, CommonWealth, Jo Ann Simmons and Elizabeth Zwick, Oct 13, 2019
  - https://commonwealthmagazine.org/opinion/the-challenge-of-aging-with-autism/

- Housing Models for Adults with Intellectual Disabilities Who Are Not in State-Supported Housing, Margolis and Bloom LLP, Task Force Chair
  - http://www.afamaction.org/adult-services-committee/

- MassLive; “Massachusetts schools serving four times as many students with autism as it did 15 years ago.” May 9, 2019

- https://www.masslive.com/politics/2019/05/massachusetts-schools-serving-four-times-as-many-students-with-autism-as-it-did-15-years-ago.html#:~:text=The%20number%20has%20nearly%20doubled,student%20population%20of%20nearly%20174%2C000.&text=In%202004%2C%20Massachusetts%20counted%205%2C383,that%20number%20increased%20to%2022%2C845.

- Massachusetts State Data Center, Economic and Public Policy Research, University of Massachusetts Donahue Institute

- New England ADA Center, Data on Disability in States, Cities and Sub-Groups in New England, March 2019
  - https://ne-ada.s3.amazonaws.com/Data+on+Disability+in+States+Cities+and+Sub-Groups+in+New+England+04.12.19.pdf

- Olmstead Final Plan -2018, Massachusetts
  - https://www.mass.gov/files/documents/2018/09/20/olmstead-final-plan-2018.pdf

Form 990 — Return of Organization Exempt From Income Tax — 2020

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047 — 2020 — Open to Public Inspection

A For the 2020 calendar year, or tax year beginning 07/01/20, and ending 06/30/21

B Check if applicable:
- [ ] Address change
- [ ] Name change
- [ ] Initial return
- [ ] Final return/terminated
- [ ] Amended return
- [ ] Application pending

C Name of organization: Friends or Relatives with Autism & Related Disabilities

Doing business as

Number and street (or P.O. box if mail is not delivered to street address): PO Box 1174 — Room/suite

City or town, state or province, country, and ZIP or foreign postal code: South Dennis MA 02660

D Employer identification number: 46-4669648

E Telephone number: 508-776-6237

G Gross receipts $ 191,187

F Name and address of principal officer:
Kathleen M Ohman
12 Thomas Court
Dennis MA 02638

H(a) Is this a group return for subordinates? [ ] Yes [X] No

H(b) Are all subordinates included? [ ] Yes [ ] No
If "No," attach a list. See instructions

H(c) Group exemption number ▶

I Tax-exempt status: [X] 501(c)(3) [ ] 501(c) ( ) ◀ (insert no.) [ ] 4947(a)(1) or [ ] 527

J Website: ▶ www.go-forward.org

K Form of organization: [X] Corporation [ ] Trust [ ] Association [ ] Other ▶

L Year of formation: 2014 **M** State of legal domicile: MA

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities:
See Schedule O

2 Check this box ▶ [ ] if the organization discontinued its operations or disposed of more than 25% of its net assets.

3	Number of voting members of the governing body (Part VI, line 1a)	3	11
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	11
5	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	5	0
6	Total number of volunteers (estimate if necessary)	6	0
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	202,349	23,693
	9	Program service revenue (Part VIII, line 2g)	35,966	62,504
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	10	26
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		99,700
	12	Total revenue – add lines 8 through 11 (must equal Part VIII, column (A), line 12)	238,325	185,923
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)		0
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)		0
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 12,877		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	59,711	147,606
	18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	59,711	147,606
	19	Revenue less expenses. Subtract line 18 from line 12	178,614	38,317

			Beginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	2,332,360	2,658,701
	21	Total liabilities (Part X, line 26)	1,999,112	2,287,136
	22	Net assets or fund balances. Subtract line 21 from line 20	333,248	371,565

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer — Date

Kathleen M Ohman — President

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
Joseph F. McGee, CPA	Joseph F. McGee, CPA	04/26/22		P01584870

Firm's name ▶ Sanders, Walsh & Eaton, CPAs, LLC — Firm's EIN ▶ 84-1894608

Firm's address ▶ PO Box F, Osterville, MA 02655 — Phone no. 508-428-0790

May the IRS discuss this return with the preparer shown above? See instructions [ ] Yes [ ] No

Part III **Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission:

See Schedule O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses $ 91,273 including grants of $) (Revenue $ 62,504)

To organize, develop and provide education and training programs and to provide hope, courage, and support to individuals with autism and related disabilities through education, employment training and supportive serves

4b (Code:) (Expenses $ including grants of $) (Revenue $)

N/A

4c (Code:) (Expenses $ including grants of $) (Revenue $)

N/A

4d Other program services (Describe on Schedule O.)

(Expenses $ including grants of $) (Revenue $)

4e Total program service expenses ▶ 91,273

Part IV Checklist of Required Schedules

		Line	Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	X	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		X
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		X
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		X
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? *If "Yes," complete Schedule D, Part V*	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI*	11a	X	
b	Did the organization report an amount for investments—other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b		X
c	Did the organization report an amount for investments—program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		X
d	Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d		X
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e		X
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f		X
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a		X
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		X
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		X
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		X
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I* See instructions	17		X
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18	X	
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		X
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21		X

Part IV Checklist of Required Schedules *(continued)*

			Yes	No
22	Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	23		X
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a*	24a		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	25b		X
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part II*	26		X
27	Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	27		X
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions, for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? *If "Yes," complete Schedule L, Part IV*	28a		X
b	A family member of any individual described in line 28a? *If "Yes," complete Schedule L, Part IV*	28b		X
c	A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? *If "Yes," complete Schedule L, Part IV*	28c		X
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? *If "Yes," complete Schedule R, Part I*	33		X
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	34		X
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		X
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b		
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	37		X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? **Note:** All Form 990 filers are required to complete Schedule O.	38	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ☐

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	5			
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c		

Part V Statements Regarding Other IRS Filings and Tax Compliance *(continued)*

				Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 0			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?		2b		
	Note: If the sum of lines 1a and 2a is greater than 250, you may be required to *e-file* (see instructions)				
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?		3a		X
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation on Schedule O*		3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		4a		X
b	If "Yes," enter the name of the foreign country ▶				
	See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		5a		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		5b		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		5c		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		6b		
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?		7a		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		7c		X
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		7e		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		7f		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		7g		X
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		7h		X
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		8		
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?		9a		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		9b		
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?		12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state?		13a		
	Note: See the instructions for additional information the organization must report on Schedule O.				
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b			
c	Enter the amount of reserves on hand	13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?		14a		X
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation on Schedule O*		14b		
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?		15		X
	If "Yes," see instructions and file Form 4720, Schedule N.				
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income?		16		X
	If "Yes," complete Form 4720, Schedule O.				

Part VI Governance, Management, and Disclosure *For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.*

Check if Schedule O contains a response or note to any line in this Part VI [X]

Section A. Governing Body and Management

			Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year — 1a: 11. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.			
b	Enter the number of voting members included on line 1a, above, who are independent — 1b: 11			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6	Did the organization have members or stockholders?	6		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	X	
b	Each committee with authority to act on behalf of the governing body?	8b	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses on Schedule O*	9		X

Section B. Policies *(This Section B requests information about policies not required by the Internal Revenue Code.)*

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		X
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a		X
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b		
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done*	12c		
13	Did the organization have a written whistleblower policy?	13		X
14	Did the organization have a written document retention and destruction policy?	14		X
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a		X
b	Other officers or key employees of the organization	15b		X
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		X
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶ MA

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

[ ] Own website [ ] Another's website [X] Upon request [ ] Other *(explain on Schedule O)*

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records ▶

Mark Ameres 88 Route 124
Harwich MA 02645 508-776-6237

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

See instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
(1) Kathleen M Ohman President	10.00 0.00	X		X				0	0	0
(2) Robert L Brennan, Jr. Vice President	2.00 0.00	X		X				0	0	0
(3) Mark Ameres Treasurer	3.00 0.00	X		X				0	0	0
(4) Robert Samoluk Clerk	4.00 0.00	X		X				0	0	0
(5) Robert F Duffy Director	1.00 0.00	X						0	0	0
(6) Nancy McHugh Director	1.00 0.00	X						0	0	0
(7) Heather Brown Director	1.00 0.00	X						0	0	0
(8) Paul McCormick Director	1.00 0.00	X						0	0	0
(9) Sheila Lyons Director	1.00 0.00	X						0	0	0
(10) Rick Presbry Director	1.00 0.00	X						0	0	0
(11) Rose Marie Strippolli Director	1.00 0.00	X						0	0	0

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
(12) David Kaplan Executive Director	23.00 0.00	X		X				36,570	0	0
1b Subtotal ▶								36,570		
c Total from continuation sheets to Part VII, Section A ▶										
d Total (add lines 1b and 1c) ▶								36,570		

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 0

		Yes	No
3 Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	3		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	4		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	5		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
Cape Associates Inc. PO Box 1858 N. Eastham MA 02651	Construction	286,266

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 1

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII ☐

					(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1a	Federated campaigns	1a					
	b	Membership dues	1b					
	c	Fundraising events	1c					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e	23,693				
	f	All other contributions, gifts, grants, and similar amounts not included above	1f					
	g	Noncash contributions included in lines 1a-1f	1g	$				
	h	**Total.** Add lines 1a–1f ▶			23,693			
Program Service Revenue				Business Code				
	2a	Rental Revenue		531110	62,504	62,504		
	b							
	c							
	d							
	e							
	f	All other program service revenue						
	g	**Total.** Add lines 2a–2f ▶			62,504			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts) ▶			26			26
	4	Income from investment of tax-exempt bond proceeds ▶						
	5	Royalties ▶						
				(i) Real / (ii) Personal				
	6a	Gross rents	6a					
	b	Less: rental expenses	6b					
	c	Rental inc. or (loss)	6c					
	d	Net rental income or (loss) ▶						
				(i) Securities / (ii) Other				
	7a	Gross amount from sales of assets other than inventory	7a					
	b	Less: cost or other basis and sales exps.	7b					
	c	Gain or (loss)	7c					
	d	Net gain or (loss) ▶						
	8a	Gross income from fundraising events (not including $ of contributions reported on line 1c). See Part IV, line 18	8a	25,489				
	b	Less: direct expenses	8b	5,264				
	c	Net income or (loss) from fundraising events ▶			20,225			
	9a	Gross income from gaming activities. See Part IV, line 19	9a					
	b	Less: direct expenses	9b					
	c	Net income or (loss) from gaming activities ▶						
	10a	Gross sales of inventory, less returns and allowances	10a					
	b	Less: cost of goods sold	10b					
	c	Net income or (loss) from sales of inventory ▶						
Miscellaneous Revenue				Business Code				
	11a	Energy rebate		531390	79,475	79,475		
	b							
	c							
	d	All other revenue						
	e	**Total.** Add lines 11a–11d ▶			79,475			
	12	**Total revenue.** See instructions ▶			185,923	141,979	0	26

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion	793			793
13 Office expenses	3,995	999	2,527	469
14 Information technology				
15 Royalties				
16 Occupancy	400			400
17 Travel	20	20		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	20,916	20,376	285	255
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	47,924	47,924		
23 Insurance	14,133	14,133		
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Professional Fees	55,829	7,566	37,829	10,434
b Equipment Exp	1,378		1,378	
c Fees	968		968	
d Telephone	782	196	469	117
e All other expenses	468	59		409
25 **Total functional expenses.** Add lines 1 through 24e	147,606	91,273	43,456	12,877
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X ☐

				(A) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing		91,621	1	141,151
	2	Savings and temporary cash investments			2	
	3	Pledges and grants receivable, net			3	
	4	Accounts receivable, net		3,726	4	
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges			9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 2,565,474			
	b	Less: accumulated depreciation	10b 47,924	2,237,013	10c	2,517,550
	11	Investments—publicly traded securities			11	
	12	Investments—other securities. See Part IV, line 11			12	
	13	Investments—program-related. See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11			15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)		2,332,360	16	2,658,701
Liabilities	17	Accounts payable and accrued expenses		23,455	17	623
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D			21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			22	
	23	Secured mortgages and notes payable to unrelated third parties		1,975,657	23	2,286,513
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D			25	
	26	**Total liabilities.** Add lines 17 through 25		1,999,112	26	2,287,136
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ X and complete lines 27, 28, 32, and 33.**				
	27	Net assets without donor restrictions		333,248	27	371,565
	28	Net assets with donor restrictions			28	
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.				
	29	Capital stock or trust principal, or current funds			29	
	30	Paid-in or capital surplus, or land, building, or equipment fund			30	
	31	Retained earnings, endowment, accumulated income, or other funds			31	
	32	Total net assets or fund balances		333,248	32	371,565
	33	Total liabilities and net assets/fund balances		2,332,360	33	2,658,701

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	185,923
2	Total expenses (must equal Part IX, column (A), line 25)	2	147,606
3	Revenue less expenses. Subtract line 2 from line 1	3	38,317
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	333,248
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	371,565

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII ☐

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a	X	
	If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b		X
	If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	X	
	If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		X
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	3b		

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047
2020
Open to Public Inspection

Name of the organization Friends or Relatives with Autism & Related Disabilities

Employer identification number 46-4669648

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ).)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state:

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:

10 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 331/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	19,028	107,418	95,450	202,349	23,693	447,938
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3	19,028	107,418	95,450	202,349	23,693	447,938
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4						447,938

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7 Amounts from line 4	19,028	107,418	95,450	202,349	23,693	447,938
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources		162	70	10	26	268
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 **Total support.** Add lines 7 through 10						448,206

12 Gross receipts from related activities, etc. (see instructions) . . . 12 | 245,737

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2020 (line 6, column (f) divided by line 11, column (f)) . . . 14 | 99.94 %

15 Public support percentage from 2019 Schedule A, Part II, line 14 . . . 15 | 99.95 %

16a **33 1/3% support test—2020.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . ▶ ☒

b **33 1/3% support test—2019.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . ▶ ☐

17a **10%-facts-and-circumstances test—2020.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . ▶ ☐

b **10%-facts-and-circumstances test—2019.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . ▶ ☐

Part III Support Schedule for Organizations Described in Section 509(a)(2)
(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 **Public support.** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2020 (line 8, column (f), divided by line 13, column (f))	15	%
16	Public support percentage from 2019 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2020** (line 10c, column (f), divided by line 13, column (f))	17	%
18	Investment income percentage from **2019** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests—2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support tests—2019.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Part IV **Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* ***Part VI*** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* ***Part VI*** *when and how the organization made the determination.*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* ***Part VI*** *what controls the organization put in place to ensure such use.*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* ***Part VI*** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.*	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* ***Part VI,*** *including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* ***Part VI.***	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* ***Part VI.***	9a		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* ***Part VI.***	9b		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* ***Part VI.***	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below.*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)*	10b		

Part IV Supporting Organizations *(continued)*

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?	**11a**		
b	A family member of a person described in line 11a above?	**11b**		
c	A 35% controlled entity of a person described in line 11a or 11b above? *If "Yes" to line 11a, 11b, or 11c, provide detail in* ***Part VI.***	**11c**		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? *If "No," describe in* ***Part VI*** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.*	**1**		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* ***Part VI*** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.*	**2**		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in* ***Part VI*** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).*	**1**		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	**1**		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? *If "No," explain in* ***Part VI*** *how the organization maintained a close and continuous working relationship with the supported organization(s).*	**2**		
3	By reason of the relationship described in line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* ***Part VI*** *the role the organization's supported organizations played in this regard.*	**3**		

Section E. Type III Functionally-Integrated Supporting Organizations

1 *Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (**see instructions**).*

- **a** ☐ The organization satisfied the Activities Test. *Complete* ***line 2*** *below.*
- **b** ☐ The organization is the parent of each of its supported organizations. *Complete* ***line 3*** *below.*
- **c** ☐ The organization supported a governmental entity. *Describe in* ***Part VI*** *how you supported a governmental entity (see instructions).*

			Yes	No
2	Activities Test. ***Answer lines 2a and 2b below.***			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* ***Part VI identify those supported organizations and explain*** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	**2a**		
b	Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in ***Part VI*** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	**2b**		
3	Parent of Supported Organizations. ***Answer lines 3a and 3b below.***			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No," provide details in* ***Part VI.***	**3a**		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If "Yes," describe in* ***Part VI*** *the role played by the organization in this regard.*	**3b**		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in* ***Part VI***). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1		
2 Recoveries of prior-year distributions	2		
3 Other gross income (see instructions)	3		
4 Add lines 1 through 3.	4		
5 Depreciation and depletion	5		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7 Other expenses (see instructions)	7		
8 **Adjusted Net Income** (subtract lines 5, 6, and 7 from line 4)	8		

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	1a		
b Average monthly cash balances	1b		
c Fair market value of other non-exempt-use assets	1c		
d **Total** (add lines 1a, 1b, and 1c)	1d		
e **Discount** claimed for blockage or other factors *(explain in detail in* ***Part VI****)*:			
2 Acquisition indebtedness applicable to non-exempt-use assets	2		
3 Subtract line 2 from line 1d.	3		
4 Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6 Multiply line 5 by 0.035.	6		
7 Recoveries of prior-year distributions	7		
8 **Minimum Asset Amount** (add line 7 to line 6)	8		

Section C – Distributable Amount			Current Year
1 Adjusted net income for prior year (from Section A, line 8, column A)	1		
2 Enter 0.85 of line 1.	2		
3 Minimum asset amount for prior year (from Section B, line 8, column A)	3		
4 Enter greater of line 2 or line 3.	4		
5 Income tax imposed in prior year	5		
6 **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6		

7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations *(continued)*

Section D – Distributions		**Current Year**
1	Amounts paid to supported organizations to accomplish exempt purposes	
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	
4	Amounts paid to acquire exempt-use assets	
5	Qualified set-aside amounts (prior IRS approval required—*provide details in **Part VI***)	
6	Other distributions (*describe in **Part VI***). See instructions.	
7	**Total annual distributions.** Add lines 1 through 6.	
8	Distributions to attentive supported organizations to which the organization is responsive (*provide details in **Part VI***). See instructions.	
9	Distributable amount for 2020 from Section C, line 6	
10	Line 8 amount divided by line 9 amount	

Section E – Distribution Allocations (see instructions)		**(i)** Excess Distributions	**(ii)** Underdistributions Pre-2020	**(iii)** Distributable Amount for 2020
1	Distributable amount for 2020 from Section C, line 6			
2	Underdistributions, if any, for years prior to 2020 (reasonable cause required–*explain in **Part VI***). See instructions.			
3	Excess distributions carryover, if any, to 2020			
a	From 2015			
b	From 2016			
c	From 2017			
d	From 2018			
e	From 2019			
f	**Total** of lines 3a through 3e			
g	Applied to underdistributions of prior years			
h	Applied to 2020 distributable amount			
i	Carryover from 2015 not applied (see instructions)			
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4	Distributions for 2020 from Section D, line 7: $			
a	Applied to underdistributions of prior years			
b	Applied to 2020 distributable amount			
c	Remainder. Subtract lines 4a and 4b from line 4.			
5	Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, *explain in **Part VI***. See instructions.			
6	Remaining underdistributions for 2020 Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in **Part VI***. See instructions.			
7	**Excess distributions carryover to 2021.** Add lines 3j and 4c.			
8	Breakdown of line 7:			
a	Excess from 2016			
b	Excess from 2017			
c	Excess from 2018			
d	Excess from 2019			
e	Excess from 2020			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2020

Name of the organization
Friends or Relatives with Autism
& Related Disabilities

Employer identification number
46-4669648

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	[X] 501(c)(3) (enter number) organization
	[ ] 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	[ ] 527 political organization
Form 990-PF	[ ] 501(c)(3) exempt private foundation
	[ ] 4947(a)(1) nonexempt charitable trust treated as a private foundation
	[ ] 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

[ ] For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

[X] For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

[ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

[ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . ▶ $ . . . .

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization: Friends or Relatives with Autism

Employer identification number: 46-4669648

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Gerie Schumann PO Box 43247 Jacksonville FL 32231	$ 10,000	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047
2020
Open to Public Inspection

Name of the organization: Friends or Relatives with Autism & Related Disabilities
Employer identification number: 46-4669648

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.
Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements.
Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).
- ☐ Preservation of land for public use (for example, recreation or education)
- ☐ Preservation of a historically important land area
- ☐ Protection of natural habitat
- ☐ Preservation of a certified historic structure
- ☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

		Held at the End of the Tax Year
a Total number of conservation easements	2a	
b Total acreage restricted by conservation easements	2b	
c Number of conservation easements on a certified historic structure included in (a)	2c	
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ $

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.
Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ $

(ii) Assets included in Form 990, Part X ▶ $

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ $

b Assets included in Form 990, Part X ▶ $

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange program
e ☐ Other ....

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements.
Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

		Amount
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V Endowment Funds.
Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ▶ .... %

b Permanent endowment ▶ .... %

c Term endowment ▶ .... %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

		Yes	No
(i) Unrelated organizations	3a(i)		
(ii) Related organizations	3a(ii)		
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	3b		

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.
Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings		2,565,474	47,924	2,517,550
c Leasehold improvements				
d Equipment				
e Other				

Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10c.)* ▶ 2,517,550

Part VII Investments – Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 12.)* ▶		

Part VIII Investments – Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 13.)* ▶		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 15.)* ▶	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 25.)* ▶	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ☐

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Part XIII Supplemental Information *(continued)*

SCHEDULE G (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization: Friends or Relatives with Autism & Related Disabilities

Employer identification number: 46-4669648

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

a ☐ Mail solicitations
b ☐ Internet and email solicitations
c ☐ Phone solicitations
d ☐ In-person solicitations
e ☐ Solicitation of non-government grants
f ☐ Solicitation of government grants
g ☐ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ Yes ☐ No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

	(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fund-raiser have custody or control of contributions? Yes	No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
Total ▶							

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II **Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))
		Special event (event type)	(event type)	None (total number)	
Revenue	1 Gross receipts	25,489			25,489
	2 Less: Contributions				
	3 Gross income (line 1 minus line 2)	25,489			25,489
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	5,264			5,264
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				5,264
	11 Net income summary. Subtract line 10 from line 3, column (d) ▶				20,225

Part III **Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶				

9 Enter the state(s) in which the organization conducts gaming activities: ....

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain:

....

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain:

....

11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No

12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

a	The organization's facility	13a	%
b	An outside facility	13b	%

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ and the amount of gaming revenue retained by the third party ▶ $

c If "Yes," enter name and address of the third party:

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization	Employer identification number
Friends or Relatives with Autism & Related Disabilities	46-4669648

Form 990 - Organization's Mission

Serve and assist individuals with autism and related disabilities by providing support with their day-today living, social and vocational skills in a supportive environment to empower each individual to achieve their highest independence and live a meaningful and valued role in society.

Form 990, Part VI, Line 11b - Organization's Process to Review Form 990

The board review form 990 prior to filing.

Form 990, Part VI, Line 19 - Governing Documents Disclosure Explanation

Furnish upon request to the general public.

Form **4562**

Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization

(Including Information on Listed Property)

▶ Attach to your tax return.

▶ Go to *www.irs.gov/Form4562* for instructions and the latest information.

OMB No. 1545-0172

2020

Attachment Sequence No. **179**

Name(s) shown on return: Friends or Relatives with Autism & Related Disabilities

Identifying number: 46-4669648

Business or activity to which this form relates: Indirect Depreciation

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	1,040,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,590,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	

6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost

7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2019 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions	11	
12	Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	
13	Carryover of disallowed deduction to 2021. Add lines 9 and 10, less line 12 ▶	13	

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year. See instructions	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	47,924

Part III MACRS Depreciation (Don't include listed property. See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2020	17	0
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B—Assets Placed in Service During 2020 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only–see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2020 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 30-year			30 yrs.	MM	S/L	
d 40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property. Enter amount from line 28	21	
22	**Total.** Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	47,924
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

There are no amounts for Page 2

FORW Friends or Relatives with Autism

46-4669648

FYE: 6/30/2021

04/26/2022 12:08 PM

Federal Asset Report

Form 990, Page 1

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	Per	Conv	Meth	Prior	Current
Other Depreciation:												
1	FY20 construction in progress	6/30/20	0				0	0	--	Memo	0	0
2	Buildings	9/30/20	2,555,944				2,555,944	40	MO	S/L	0	47,924
3	Landscaping	6/29/21	9,530				9,530	40	MO	S/L	0	0
	Total Other Depreciation		2,565,474				2,565,474				0	47,924
	Total ACRS and Other Depreciation		2,565,474				2,565,474				0	47,924
	Grand Totals		2,565,474				2,565,474				0	47,924
	Less: Dispositions and Transfers		0				0				0	0
	Less: Start-up/Org Expense		0				0				0	0
	Net Grand Totals		2,565,474				2,565,474				0	47,924

MA Asset Report

Form 990, Page 1

Asset	Description	Date In Service	Cost	Basis for Depr	MA Prior	MA Current	Federal Current	Difference Fed - MA
Other Depreciation:								
1	FY20 construction in progress	6/30/20	0	0	0	0	0	0
2	Buildings	9/30/20	2,555,944	2,555,944	0	47,924	47,924	0
3	Landscaping	6/29/21	9,530	9,530	0	0	0	0
	Total Other Depreciation		2,565,474	2,565,474	0	47,924	47,924	0
	Total ACRS and Other Depreciation		2,565,474	2,565,474	0	47,924	47,924	0
	Grand Totals		2,565,474	2,565,474	0	47,924	47,924	0
	Less: Dispositions		0	0	0	0	0	0
	Less: Start-up/Org Expense		0	0	0	0	0	0
	Net Grand Totals		2,565,474	2,565,474	0	47,924	47,924	0

Depreciation Adjustment Report

All Business Activities

Form	Unit	Asset	Description	Tax	AMT	AMT Adjustments/ Preferences

There are no assets that meet the criteria of this report

Future Depreciation Report FYE: 6/30/22

Form 990, Page 1

Asset	Description	Date In Service	Cost	Tax	AMT
Other Depreciation:					
1	FY20 construction in progress	6/30/20	0	0	0
2	Buildings	9/30/20	2,555,944	63,899	0
3	Landscaping	6/29/21	9,530	238	0
	Total Other Depreciation		2,565,474	64,137	0
	Total ACRS and Other Depreciation		2,565,474	64,137	0
	Grand Totals		2,565,474	64,137	0

MA Future Depreciation Report FYE: 6/30/22

Form 990, Page 1

Asset	Description	Date In Service	Cost	MA
Other Depreciation:				
1	FY20 construction in progress	6/30/20	0	0
2	Buildings	9/30/20	2,555,944	63,899
3	Landscaping	6/29/21	9,530	238
	Total Other Depreciation		2,565,474	64,137
	Total ACRS and Other Depreciation		2,565,474	64,137
	Grand Totals		2,565,474	64,137

Form **990**

Event Income and Deduction Worksheet

2020

Description Special event

Name: Friends or Relatives with Autism

Taxpayer Identification Number: 46-4669648

Use this worksheet to verify data entered for a specific activity on your form 990/990EZ

Income & Expense Summary:

1. Gross receipts or sales	1.	25,489
2. Advertising income	2.	
3. Circulation income	3.	
4. Other income	4.	
5. Returns and allowances	5.	
6. Contributions received	6.	
7. Total revenue. Add lines 1 through 6	7.	25,489
8. Cost of Goods Sold	8.	
9. Employment Expense	9.	
10. Fees for services	10.	
11. Indirect Expense	11.	
12. Depreciation Expense	12.	
13. Exempt Activity Expense	13.	
14. Fundraising Expense	14.	5,264
15. Total expenses. Add lines 8 through 14	15.	5,264
16. Net Income/Loss. Line 7 minus Line 15	16.	20,225

Expense Details - Cost of Goods Sold:

Beginning inventory	
Purchases	
Labor	
Section 263A costs	
Other costs	
Ending inventory	
Total Cost of Goods Sold	

Expense Details - Employment Expense:

Compensation of officers	
Other salaries and wages	
Pension plan contributions	
Other employee benefits	
Payroll taxes	
Total Employment Expense	

Expense Details - Fees for Services:

Management	
Legal	
Accounting	
Lobbying	
Professional fundraising	
Investment management	
Other	
Total Fees for Services	

Expense Details - Indirect Expense:

Advertising and promotion	
Office	
Printing/publication/postage	
Info technology/Maintenance	
Royalties & License Fees	
Occupancy/Real Estate Taxes	
Travel & Repairs	
Travel/entertainment (officials)	
Conferences/meetings	
Interest	
Insurance	
Total Indirect Expense	

Expense Details - Depreciation Expense:

On investment property	
On non-investment property	
Amortization	
Depletion	
Total Depreciation Expense	

Expense Details - Exempt Activity Expense:

Repairs and Maintenance	
Bad debts	
Taxes/licenses	
Charitable contributions	
Dividend recd deductions	
Readership costs	
Other expenses	
Total Exempt Activity Expense	

Expense Details - Fundraising Expense:

Cash prizes	
Non-cash prizes	
Rent and facility costs	
Food & beverages (Part II only)	
Entertainment (Part II only)	
Other direct expenses	5,264
Total Fundraising Expense	5,264

Information is indicated for use on Form 990-T, Schedule A:

Part V, Debt Financing
Part VI, Controlled Org Income
Part VII, Investments for C(7)(9)(17)
Part VIII, Exploited Activities
Part IX, Advertising Income

Allocation of Expense to Program Service Accomplishments:

First	
Second	
Third	
All other	

Form **990**

Two Year Comparison Report

2019 & 2020

For calendar year 2020, or tax year beginning 07/01/20 , ending 06/30/21

Name: Friends or Relatives with Autism & Related Disabilities

Taxpayer Identification Number: 46-4669648

			2019	2020	Differences
Revenue	1. Contributions, gifts, grants	1.			
	2. Membership dues and assessments	2.			
	3. Government contributions and grants	3.	202,349	23,693	-178,656
	4. Program service revenue	4.	35,966	62,504	26,538
	5. Investment income	5.	10	26	16
	6. Proceeds from tax exempt bonds	6.			
	7. Net gain or (loss) from sale of assets other than inventory	7.			
	8. Net income or (loss) from fundraising events	8.		20,225	20,225
	9. Net income or (loss) from gaming	9.			
	10. Net gain or (loss) on sales of inventory	10.			
	11. Other revenue	11.		79,475	79,475
	12. **Total revenue.** Add lines 1 through 11	12.	238,325	185,923	-52,402
Expenses	13. Grants and similar amounts paid	13.			
	14. Benefits paid to or for members	14.			
	15. Compensation of officers, directors, trustees, etc.	15.			
	16. Salaries, other compensation, and employee benefits	16.			
	17. Professional fundraising fees	17.			
	18. Other professional fees	18.			
	19. Occupancy, rent, utilities, and maintenance	19.	2,392	400	-1,992
	20. Depreciation and Depletion	20.		47,924	47,924
	21. Other expenses	21.	57,319	99,282	41,963
	22. **Total expenses.** Add lines 13 through 21	22.	59,711	147,606	87,895
	23. **Excess or (Deficit).** Subtract line 22 from line 12	23.	178,614	38,317	-140,297
Other Information	24. Total exempt revenue	24.	238,325	185,923	-52,402
	25. Total unrelated revenue	25.			
	26. Total excludable revenue	26.	35,976	142,005	106,029
	27. Total assets	27.	2,332,360	2,658,701	326,341
	28. Total liabilities	28.	1,999,112	2,287,136	288,024
	29. Retained earnings	29.	333,248	371,565	38,317
	30. Number of voting members of governing body	30.	10	11	
	31. Number of independent voting members of governing body	31.	10	11	
	32. Number of employees	32.	0	0	
	33. Number of volunteers	33.			

Form 990 Tax Return History 2020

Name: Friends or Relatives with Autism & Related Disabilities

Employer Identification Number: 46-4669648

	2016	2017	2018	2019	2020	2021
Contributions, gifts, grants				202,349	23,693	
Membership dues						
Program service revenue				35,966	62,504	
Capital gain or loss						
Investment income				10	26	
Fundraising revenue (income/loss)					20,225	
Gaming revenue (income/loss)						
Other revenue					79,475	
Total revenue				238,325	185,923	
Grants and similar amounts paid						
Benefits paid to or for members						
Compensation of officers, etc.						
Other compensation						
Professional fees						
Occupancy costs				2,392	400	
Depreciation and depletion					47,924	
Other expenses				57,319	99,282	
Total expenses				59,711	147,606	
Excess or (Deficit)				178,614	38,317	

	2016	2017	2018	2019	2020	2021
Total exempt revenue				238,325	185,923	
Total unrelated revenue						
Total excludable revenue				35,976	142,005	
Total Assets				2,332,360	2,658,701	
Total Liabilities				1,999,112	2,287,136	
Net Fund Balances				333,248	371,565	

Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.

(a nonprofit corporation)

FINANCIAL STATEMENTS

For the Year Ended June 30, 2021

Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.
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For the Year Ended June 30, 2021

SWE
SANDERS, WALSH & EATON CPAs, LLC
CERTIFIED PUBLIC ACCOUNTANTS

INDEPENDENDENT ACCOUNTANT'S REVIEW REPORT

To the Board of Directors
Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.
Dennis, Massachusetts

We have reviewed the accompanying financial statements of the Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc. (a nonprofit corporation), which comprise the statement of financial position as of June 30, 2021, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements. A review includes primarily applying analytical procedures to management's financial data and making inquiries of management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatements, whether due to fraud or error.

Accountant's Responsibility

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. Those standards require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with accounting principles generally accepted in the United States of America. We believe that the results of our procedures provide a reasonable basis for our conclusion.

Accountant's Conclusion

Based on our review, we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in accordance with accounting principles generally accepted in the United States of America.

Sanders, Walsh & Eaton, CPAs, LLC

Chatham, Massachusetts
January 19, 2022

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P.O. Box F • Osterville, MA 02655 • Tel: 508.428.0790 • 877.428.1040 • Fax: 508.428.6150
P.O. Box 670 • Sandwich, MA 02563 • Tel: 774.338.5444 • Fax: 774.413.9922

Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.

Statement of Financial Position

For the Year Ended June 30, 2021

ASSETS

		2021
Current Assets:		
Cash and cash equivalents	$	141,151
Accounts receivable, net		-
Total Current Assets		141,151
Noncurrent Assets:		
Property and equipment, net of depreciation		2,517,550
Total Noncurrent Assets		2,517,550
Total Assets	$	2,658,701

LIABILITIES AND NET ASSETS

Current Liabilities:		
Accounts payable and accrued expenses	$	622
Mortgage payable, current portion		9,128
Total Current and Total Liabilities		9,750
Long-Term Liabilities:		
Mortgage payable, less current portion		2,277,385
Total Long-Term Liabilities		2,277,385
Total Liabilities		2,287,135
Net Assets:		
Without donor restrictions		371,566
With donor restrictions		-
Total Net Assets		371,566
Total Liabilities and Net Assets	$	2,658,701

The accompanying notes are an integral part of these financial statements

Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.

Statement of Activities

For the Year Ended June 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Revenue, Gains and Other Support:			
Contributions and grants	$ 23,693	$ -	$ 23,693
Special events, net $5,264 expenses	20,225	-	20,225
Rental revenue, net	62,504	-	62,504
Other revenue - construction energy rebates	79,475	-	79,475
Interest income, net	26	-	26
Net assets released from restrictions	-	-	-
Total Revenue, Gains and Other Support	185,922	-	185,922
Expenses:			
Program services	91,271	-	91,271
Management and general	43,455	-	43,455
Fundraising	12,877	-	12,877
Total Expense	147,604	-	147,604
Change in Net Assets	38,318	-	38,318
Net Assets, Beginning of Year	333,248	-	333,248
Net Assets, End of Year	$ 371,566	$ -	$ 371,566

The accompanying notes are an integral part of these financial statements

Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.

Statement of Functional Expenses

For the Year Ended June 30, 2021

	Program Services	Management and General	Fundraising	Total
Expenses:				
Depreciation	$ 47,924	$ -	$ -	$ 47,924
Equipment	-	1,378	-	1,378
Dues and registration fees	-	968	-	968
Advertising	-	-	793	793
Insurance	14,133	-	-	14,133
Interest & Bank Fees	20,376	285	255	20,915
Office	999	2,527	469	3,994
Professional services	7,566	37,829	10,434	55,829
Rent	-	-	400	400
Subscriptions	-	-	409	409
Telephone	196	469	117	782
Training and education	59	-	-	59
Travel and transportation	20	-	-	20
Total	$ 91,271	$ 43,455	$ 12,877	$ 147,604

Friends or Relatives with Autism & Related Disabilities - F.O.R.W.A.R.D. Inc.

Statement of Financial Position

For the Year Ended June 30, 2021

Cash Flows from Operating Activities:	
Change in net assets	$ 38,318
Adjustments to reconcile changes in net assets to net cash provided by operating activities:	
Depreciation	47,924
(Increase) Decrease in:	
Accounts receivable	3,727
Increase (decrease) in:	
Accounts payable and accrued expenses	20,451
Net Cash Provided by Operating Activities	110,421
Cash Flows from Investing Activities:	
Construction of new building	(328,462)
Net Cash Used in Investing Activities	(328,462)
Cash Flows from Financing Activities:	
Proceeds from mortgage	319,343
Principal loan payments	(8,487)
Net Cash Provided by Financing Activities	310,857
Net Change in cash and cash equivalents	92,815
Cash and cash equivalents, Beginning of Year	48,336
Cash and cash equivalents, End of Year	$ 141,151
Supplemental Disclosure of Cash Flow Information:	
Cash paid during the year for interest	$ 20,376

The accompanying notes are an integral part of these financial statements

NOTE A – PRINCIPAL ACTIVITY AND SIGNIFICANT ACCOUNTING POLICIES

Organization

Friends or Relatives with Autism & Related Disabilities, FORWARD Inc. (Organization) was established on January 1, 2014 in Dennis, Massachusetts. FORWARD, Inc. builds affordable supportive homes that enable adults with autism and related disabilities to thrive in an appropriate, safe and healthy environment.

Cash and Cash Equivalents

The Organization considers all cash and highly liquid financial instruments with original maturities of three months or less, which are neither held for nor restricted by donors for long-term purposes, to be cash and cash equivalents.

Property and Equipment

The Organization records property and equipment additions over $5,000 at cost, or if donated, at fair value on the date of donation. Depreciation and amortization are computed using the straight-line method over the estimated useful lives of the assets ranging from 5 to 40 years. When assets are sold or otherwise disposed of, the cost and related depreciation or amortization are removed from the accounts, and any resulting gain or loss is included in the statements of activities. Costs of maintenance and repairs that do not improve or extend the useful lives of the respective assets are expensed currently.

The Organization reviews the carrying values of property and equipment for impairment whenever events or circumstances indicate that the carrying value of an asset may not be recoverable from the estimated future cash flows expected to result from its use and eventual disposition. When considered impaired, an impairment loss is recognized to the extent carrying value exceeds the fair value of the asset. There were no indicators of asset impairment during the year ended June 30, 2021.

Net Assets

Net assets, revenues, gains, and losses are classified based on the existence or absence of donor- or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net assets without donor restrictions: Net assets available for use in general operations and not subject to donor or certain grantor imposed restrictions. These net assets may be used at the discretion of management and the Board of Directors.

Net assets with donor restrictions: – Net assets subject to donor or certain grantor imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. The Organization reports contributions restricted by donors as increases in net assets with donor restrictions if they are received with donor stipulations that limit the use of the donated assets. When a donor restriction expires, that is, when a stipulated time restriction ends, or purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the consolidated statements of activities as net assets released from restrictions. Gifts of long-lived assets and gifts of cash restricted for the acquisition of long-lived assets are recognized as restricted revenue when received and released from restrictions when the assets are placed in service. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

NOTE A – PRINCIPAL ACTIVITY AND SIGNIFICANT ACCOUNTING POLICIES (Continued)

Revenue and Revenue Recognition
The Organization recognizes net rent revenue in the period in which the rent is earned. Net rent revenue represents total possible rent revenue if 100% of units are occupied during the year less vacancies. Rents collected in advance are deferred until the rental revenue is earned. Special events revenue is comprised of an exchange element based upon the direct benefits donors receive and a contribution element for the difference. The Organization recognizes special events revenue equal to the fair value of direct benefits to donors when the special event takes place. The Organization recognizes the contribution element of special event revenue immediately, unless there is a right of return if the special event does not take place. All goods and services are transferred at a point in time.

The Organization recognizes contributions and grants when cash, securities or other assets, an unconditional promise to give, or a notification of a beneficial interest is received. Conditional promises to give, that is, those with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

Donated services and in-kind contributions
Volunteers contribute significant amounts of time to the Organization's program services, administration, and fundraising and development activities; however, the financial statements do not reflect the value of these contributed services because they do not meet recognition criteria prescribed by generally accepted accounting principles. Contributed goods are recorded at fair value at the date of donation. Donated professional services are recorded at the respective fair values of the services received. No significant contributions of such goods or services were received during the year ended June 30, 2021.

Advertising Costs
The Organization follows the policy of charging the cost of advertising to expense as incurred. Advertising expense for the year ended June 30, 2021 was $793.

Basis of Accounting
The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America.

Functional Expenses
The cost of program and supporting service activities have been summarized on a functional basis in the statement of activities. The statements of functional expenses present the natural classification detail of expenses by function. Accordingly, certain costs have been allocated among the programs and supporting services benefited on a reasonable basis that is consistently applied. The expenses that are allocated include professional services, office expenses, interest, telephone, and other, which are allocated on the basis of estimates of time and effort.

Use of Estimates
The preparation of financial statements in conformity with generally accepted accounting principles requires us to make estimates and assumptions that affect the reported amounts of assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates, and those differences could be material.

NOTE A – PRINCIPAL ACTIVITY AND SIGNIFICANT ACCOUNTING POLICIES (Continued)

Income Taxes
The Organization is organized as a Massachusetts nonprofit corporation and has been recognized by the IRS as exempt from federal income taxes under IRC Section 501(a) as an organization described in IRC Section 501(c)(3), qualify for the charitable contribution deduction under IRC Sections 170(b)(1)(A)(vi) and (viii), and has been determined not to be a private foundation under IRC Sections 509(a)(1) and (3), respectively. The Organization is annually required to file a Return of Organization Exempt from Income Tax (Form 990) with the IRS. In addition, the Organization is subject to income tax on net income that is derived from business activities that are unrelated to their exempt purposes. The Organization has determined that it is not subject to unrelated business income tax and have not filed an Exempt Organization Business Income Tax Return (Form 990-T) with the IRS.

Financial Instruments and Credit Risk
The Organization manages deposit concentration risk by placing cash, money market accounts, and certificates of deposit with financial institutions believed by to be creditworthy. At times, amounts on deposit may exceed insured limits or include uninsured investments in money market mutual funds. To date, the Organization has not experienced losses in any of these accounts.

Receivables and Credit Policies
Accounts receivable consist primarily of noninterest-bearing amounts due for rent. The Organization determines the allowance for uncollectable accounts receivable based on historical experience, an assessment of economic conditions, and a review of subsequent collections. Accounts receivable are written off when deemed uncollectable. At June 30, 2021, the allowance was $0.

NOTE B - LIQUIDITY AND AVAILABILITY

The following represents the Organization's financial assets at June 30, 2020:

	2021
Financial assets at year end:	
Cash and cash equivalents	$ 141,151
Accounts receivable, net	-
Total financial assets	141,151
Less amounts not available to be used within one year due to donor restrictions	-
Financial assets available to meet general expenditures over the next twelve months	$ 141,151

The Organization operates with balanced budget for each fiscal year and anticipates collecting sufficient revenue to cover short term general expenditures not covered by donor-restricted resources. A substantial portion of annual revenue is comprised of grants and contributions, rental revenue and revenue from other sources earned during the year. The Organization considers general expenditures to consist of all expenses related to its ongoing program activities, and the expenses related to management and general and fundraising activities undertaken to support those services.

NOTE B - LIQUIDITY AND AVAILABILITY (Continued)

The Organization regularly monitors liquidity to meets its operating needs and other commitments and obligations. The Organization's goal is generally to maintain financial assets to meet 90 days of operating expenses. As part of its liquidity plan, excess cash is invested in money market accounts. Management prepares regular cash flow projections to determine liquidity needs. Refer to the statement of cash flows which identifies the sources and uses of the Organization's cash.

NOTE C – PROPERTY AND EQUIPMENT

Property and equipment consists of the following at December 31, 2021:

	2021
Buildings and improvements	$ 2,565,474
Less accumulated depreciation	(47,924)
	$ 2,517,550

NOTE D - NOTES PAYABLE

Notes payable consist of the following at December 31, 2021:

<u>Blue Hub Loan Fund, Inc.</u> Note payable to Blue Hub Loan Fund, Inc. Originally a construction loan, converted to a regular loan on August 2, 2020 for a term of four (4) years, with a loan value of $467,346. Interest is at 5.5% and monthly payments, starting September 1, 2020, are $2,886. A balloon payment consisting of all principal and accrued interest due is payable on August 2, 2024. The loan is collateralized by property located at 131 Hokum Rock Road, Dennis, Massachusetts.	$ 461,513
The Organization incurred interest costs totaling $24,932 on the Blue Hub Loan for the year ended June 30, 2021, of which $4,556 was capitalized.	
<u>DHCD Housing Trust Fund Program</u> Note payable to the Dept. of Housing and Community Development (DHCD) under the Housing Trust Fund Program, 0.00% interest and balloon payment of $500,000 due May 2, 2050, the loan is collateralized by property located at 131 Hokum Rock Road, Dennis, Massachusetts. During the one year period prior to the maturity of the Note, the Organization may request that the holder extend the maturity date for a period of up to the original term of the loan.	500,000

NOTE D - NOTES PAYABLE (Continued)

<u>Town of Dennis</u> Note payable to the Town of Dennis, in the amount of $500,000 at 0.00% interest. The loan is collateralized by property located at 131 Hokum Rock Road, Dennis, Massachusetts. Loan is payable only upon an "event default" of the terms listed in the mortgage/security agreement.	500,000
<u>Town of Barnstable</u> Note payable to the Town of Barnstable, in the amount of $250,000 at 0.00% interest. The loan is collateralized by property located at 131 Hokum Rock Road, Dennis, Massachusetts. Loan is payable only upon an "event default" of the terms listed in the mortgage/security agreement.	250,000
<u>Town of Brewster</u> Note payable to the Town of Brewster, in the amount of $75,000 at 0.00% interest. The loan is collateralized by property located at 131 Hokum Rock Road, Dennis, Massachusetts. Loan is payable only upon an "event default" of the terms listed in the mortgage/security agreement.	75,000
<u>CEDAC, Facilities Consolidation Fund</u> Note payable to the Community Economic Development Assistance Corporation under the Facilities Consolidation Fund, 0.00% interest and balloon payment of $500,000 due May 2, 2050, the loan is collateralized by property located at 131 Hokum Rock Road, Dennis, Massachusetts. Upon maturity date the Organization may apply to extend the term of the Note for additional periods of up to 10 years each, provided that the project continues to comply with FCF program requirements.	500,000
Total	$ 2,286,513

Estimated annual maturities of notes principal payments in each of the next five years as of June 30 are as:

2022	$	9,128
2023		9,650
2024		10,203
2025		432,532
2025		-
Thereafter		1,825,000
	$	2,286,513

NOTE E – GROUND LEASE

The Organization entered into a 99 year ground lease with the town of Dennis on June 25, 2019. This ground lease was awarded to the Organization through a request for proposal process for the development of affordable housing at 131 Hokum Rock Road. Base rent is set at one dollar per lease year and was payable in advance at the commencement date. In addition to the base rent, the Organization is responsible for all "impositions" in connection to both the land and any improvements to the land. (Impositions include but are not limited to taxes, fees, municipal liens, sewer betterment charges, sewer usage, levies, late fees etc.)

The Organization has acknowledged that this is an absolute triple net lease, and that all costs, expenses and obligations of any kind relating to the premises, including without limitation all construction, alterations, maintenance, repairs, restoration, reconstruction and replacements as hereinafter provided, which may arise or become due during the term hereof, shall be paid by Organization at their sole cost and expense.

NOTE F - CURRENT VULNERABILITY DUE TO CERTAIN CONCENTRATIONS

Concentration in Affordable Housing Market
The Organization's sole asset is two units that house a total of 8 residents and a large portion of the organization's revenue will be derived from rents. The Organization has entered into a 5 year lease and management agreement with Cape Abilities to rent both units 1 and 2, effective June 9, 2020, expiring June 8, 2025. Rent is set at $2,600 a month per unit. Cape Ability's responsibilities include 24/7 provision of quality care, including health and safety care, residential support services, implementation of Individual Support Plans and other related services to individuals with autism and other disabilities living at the property, as well as a property management and other related services.

The Organizations operations are concentrated in affordable housing and are subject to the administrative directives, rules and regulations of federal, state and local regulatory agencies. Such administrative directives, rules and regulations are subject to change by a State Housing Agency or an act of Congress. Such changes may occur with little notice or inadequate funding to pay for the related cost, including the additional administrative burden, to comply with a change.

NOTE G - SUBSEQUENT EVENTS

The Organization has evaluated subsequent events through January 19, 2022, the date the financial statements were available to be issued. Management is currently evaluating the impact of the COVID-19 pandemic and has concluded that while it is reasonably possible that the virus could have a negative effect on the Organization's financial position and results of operations, the specific impact is not readily determinable as of the date of these financial statements. The financial statements do not include any adjustments that might result from the outcome of this uncertainty.

AMENDED AND RESTATED* AFFORDABLE HOUSING RESTRICTION

DATE: As of February 6, 2021

GRANTOR:	Friends Or Relatives With Autism & Related Disabilities - F.O.R.W.A.R.D., Inc.
SUBLESSEE:	CAPE ABILITIES, INC.
PROPERTY NAME:	FORWARD at the Rock
TOTAL NUMBER OF UNITS:	8
TOTAL NUMBER OF RESTRICTED UNITS:	8
NUMBER OF HIGH MODERATE INCOME UNITS (100% AMI):[1]	0
NUMBER OF MODERATE INCOME UNITS (80% AMI):	0
NUMBER OF LOW INCOME UNITS (60% AMI):	0
NUMBER OF VERY LOW INCOME UNITS (50% AMI):	0
NUMBER OF EXTREMELY LOW INCOME UNITS (30% AMI):	8
PROPERTY ADDRESS:	131 Hokum Rock Road Dennis, Massachusetts
TERM:	Perpetual

This Affordable Housing Restriction (this "Restriction") is granted by the undersigned Grantor, a Massachusetts not-for-profit corporation having a mailing address of PO Box 1174, Dennis,

* This Amended and Restated Affordable Housing Restriction amends and restates in its entirety that certain Affordable Housing Restriction, dated as of August 2, 2019, by Grantor in favor of The Commonwealth of Massachusetts acting by and through the Department of Housing and Community Development; Community Economic Development Assistance Corporation, a body politic and corporate, duly organized and existing in accordance with Chapter 40H of the Massachusetts General Laws; the Town of Dennis, Massachusetts; The Inhabitants of the Town of Barnstable a Massachusetts municipal corporation known as the Town of Barnstable organized under a charter adopted pursuant to Mass. Const. Amend. Art. 89 § 3 on April 11, 1989; the Department of Mental Health of Executive Office of Health and Human Services, established pursuant to M.G.L. c. 19; and the Department of Developmental Services of the Executive Office of Health and Human Services, established pursuant to M.G.L. c. 19B, recorded with Barnstable Registry of Deeds in Book 32201, Page 178.

[1]Numbers in parentheses are the percentage of median income for the Area (AMI, as defined below), adjusted for family size, as determined from time to time by HUD (as defined below) pursuant to Section 8 of the United States Housing Act, as amended.

Massachusetts 02660, for the benefit of The Commonwealth of Massachusetts acting by and through the Department of Housing and Community Development having a mailing address of 100 Cambridge Street, Suite 300, Boston, Massachusetts 02114-2524 ("DHCD"); Community Economic Development Assistance Corporation, a body politic and corporate, duly organized and existing in accordance with Chapter 40H of the Massachusetts General Laws with an office at 18 Tremont Street, Suite 500, Boston, Massachusetts 02108 ("CEDAC"); the Town of Dennis, Massachusetts, having an address at 685 Route 134, South Dennis, Massachusetts 02660 (the "Town of Dennis"); The Inhabitants of the Town of Barnstable a Massachusetts municipal corporation known as the Town of Barnstable organized under a charter adopted pursuant to Mass. Const. Amend. Art. 89 § 3 on April 11, 1989, having an address at New Town Hall, 367 Main Street, Hyannis Massachusetts 02601 (the "Town of Barnstable); the Town of Brewster, a municipal corporation duly organized under the laws of Massachusetts, acting by and through the Community Preservation Committee, having a usual place of business at 2198 Main Street, Brewster, Massachusetts 02631 (the "Town of Brewster"); the Department of Mental Health of Executive Office of Health and Human Services, established pursuant to M.G.L. c. 19, with a mailing address of 25 Staniford Street, Boston, Massachusetts 02114 ("DMH"); and the Department of Developmental Services of the Executive Office of Health and Human Services, established pursuant to M.G.L. c. 19B, with a mailing address of 500 Harrison Avenue, Boston, Massachusetts 02118 ("DDS").

BACKGROUND

A. The Grantor holds or will acquire a leasehold interest in the Property and intends to construct a 8-unit rental housing development, consisting of one residential building, at the Property (the "Project").

B. As a condition of the Loan, the Grantor has agreed that this Restriction be imposed upon the Property as a covenant running with the land and binding upon any successor to the Grantor, as owner thereof.

RESTRICTIONS

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Grantor hereby covenants as follows:

1. Definitions. Capitalized terms used herein are defined herein and in Exhibit D attached hereto.

2. Use Restrictions. The Property shall be reserved and used for the Permitted Uses and for no other purpose. The Restricted Units shall include at least 8 SRO Units. 8 of the Restricted Units shall be deemed to be assisted under the HTF Program ("HTF Assisted Units") provided that certain of the provisions of the HTF Program may cease to be effective 30 years after the completion of the Project (the "HTF Term") as more fully set forth in Section 5.2 of the Loan Agreement between Grantor as Borrower and The Commonwealth of Massachusetts acting by and through the Department of Housing and Community Development for itself and as agent for certain other lenders. Such HTF Assisted Units may also constitute Restricted Units with respect to other programs hereunder. The

Property also shall include at least eight (8) Units accessible to individuals with mobility impairments and at least eight (8) Unit accessible to individuals with sensory impairments. Each Unit shall contain complete facilities for living, sleeping, eating, cooking and sanitation that are to be used on other than a transient basis, provided, however, that SRO Units do not contain cooking and sanitation facilities. Each Unit shall meet the housing quality standards set forth in the regulations of HUD at 24 C.F.R. §982.401 or any successor thereto, the accessibility requirements at 24 C.F.R. Part 8 or any successor thereto (which implement Section 504 of the Rehabilitation Act of 1973), Titles II and III of the Americans with Disabilities Act implemented at 28 C.F.R. Parts 35 and 36, and, if applicable, the design and construction requirements of 24 C.F.R. §100.205 or any successor thereto (which implement the Fair Housing Act). Throughout the term hereof, the Grantor shall maintain the Property and the Improvements in good, safe and habitable condition in all respects and in full compliance with all applicable laws, by-laws, rules and regulations of any governmental (or quasi-governmental) body with jurisdiction over matters concerning the condition of the Property.

3. Occupancy Restrictions. The following restrictions shall apply during the period commencing with the first date on which any Units are occupied and continuing for the balance of the term of this Restriction.

A. Extremely Low Income Units. At least 8 of the Units of the types shown on Exhibit C attached hereto shall be leased exclusively to Extremely Low Income Families ("Extremely Low Income Units"). The monthly rent charged to a Family occupying an Extremely Low Income Unit shall be one-twelfth of thirty percent (30%) of thirty percent (30%) of the Bedroom Adjusted AMI, minus, if applicable, an allowance established by the Holders for any utilities and services (excluding telephone) to be paid by the occupying Family. A Family who resides in a Restricted Unit, who qualified as an Extremely Low Income Family at the time of such Family's initial occupancy at the Property and whose Household Income exceeds thirty percent (30%), but does not exceed fifty percent (50%) of the Family-size Adjusted AMI, shall continue to be treated as an Extremely Low Income Family but, from and after the expiration of the then-current term of such Family's lease, must pay as monthly rent the Over-income Rent. A Family who resides in a Restricted Unit, who qualified as an Extremely Low Income Family at the time of such Family's initial occupancy at the Property and whose Household Income exceeds fifty percent (50%), but does not exceed eighty percent (80%), of the Family-size Adjusted AMI, shall, from and after the expiration of the then-current term of such Family's lease, be treated as a Low Income Family and must pay as monthly rent the lesser of (x) the maximum amount payable by the Family under the laws of the municipality in which the Property is located or of The Commonwealth of Massachusetts, (y) one-twelfth of thirty percent (30%) of sixty percent (60%) of the Bedroom Adjusted AMI (minus, if applicable, an allowance established by the Holders for any utilities and services [excluding telephone] to be paid by the occupying Family) A Family who resides in a Restricted Unit, who qualified as an Extremely Low Income Family at the time of such Family's initial occupancy at the Property and whose Household Income exceeds eighty percent (80%) of the Family-size Adjusted AMI, shall, from and after the expiration of the then-current term of such Family's lease, no longer be treated as an income-qualified Family and must pay as monthly rent the Over-income Rent.

B. Applicable Lease Term, Change of Status. References in the foregoing provisions of the "then-current term of such Family's lease" shall refer to the term of the lease or occupancy agreement in effect on the date of the required delivery of the income certification that reflects (or that, if duly delivered, would have reflected) the applicable increase in such Family's income. If, with the Holders' consent, the Grantor does not require that a lease be signed for a Restricted Unit (e.g., a property providing short-term transitional housing), the provisions set forth above shall apply, except that the applicable date on which a Family's income-qualified status and/or applicable rent restriction is modified shall be the first day of the month that is at least thirty (30) days following the date of the required delivery of the income certification that reflects (or that, if duly delivered, would have reflected) the applicable increase in such Family's income.

C. Federal or State Rental Subsidy. If a Restricted Unit or the Family occupying such Unit receives federal or state rental subsidy, then the Family's contribution towards rent shall be the contribution allowable under the federal or state rental subsidy program and the maximum rent (i.e., tenant contribution plus rental subsidy) shall be the rent allowable under the federal or state rental subsidy program.

D. Next Available Unit Rule. Subject to the foregoing, available Units shall be leased, rented or otherwise made available to Extremely Low Income Families. The foregoing provisions shall be applied so as to maintain a mix of Restricted Units that is comparable in size, features and number of bedrooms to the originally designated Restricted Units (i.e., a Unit will not be considered an available Unit for purposes of this Paragraph if classification of such Unit as a Restricted Unit would cause the then current mix of Restricted Units to no longer be comparable to the original mix of Restricted Units described in Section 2 above and as shown on Exhibit C).

E. SRO Rents. Notwithstanding the foregoing, the monthly rent charged to an income-qualified Family occupying a Restricted Unit that is an SRO Unit shall not exceed seventy-five percent (75%) of the rent otherwise payable for a Studio Unit at such Family's income level.

F. FCF Eligible Residents. If at any time fewer than eight (08) Units at the Property are leased, rented or occupied by FCF Eligible Residents, then the next available Units at the Property shall all be leased, rented or otherwise made available to FCF Eligible Residents until the required number of Units occupied by FCF Eligible Residents is again obtained. If at any time DMH or DDS is no longer able or willing to refer DMH or DDS clients to the Property because of a change in DMH or DDS program needs with respect to the Property, the Grantor will notify CEDAC as soon as the Grantor is aware that DMH or DDS is unable to provide an FCF Eligible Resident for any Unit which is vacant or for which a vacancy is pending. In such event, the Grantor and CEDAC will meet and consult in good faith with DMH and DDS to identify an appropriate eligible population acceptable to CEDAC for such Units, consistent with the then applicable FCF Regulations and FCF Guidelines. If any of such Units remains vacant for a period of thirty (30) days or longer because of a change in DMH or DDS program needs, the Grantor shall notify CEDAC that if a suitable Resident is not agreed upon within an additional thirty (30) days, the Grantor will lease the Unit to a non-FCF Eligible Resident, and if neither DMH, DDS nor CEDAC identifies an acceptable FCF Eligible Resident within said additional thirty (30) day period, the Grantor may proceed to rent such Unit to a non-FCF Eligible Resident.

G. **Supportive Services.** At all times during the Term, the Grantor shall maintain a social supportive service program (the "Support Program") administered by either (i) the Grantor or (ii) a third-party service provider approved by DHCD. If the Support Program is administered by a third-party provider, the Grantor shall submit documentation to DHCD detailing a successful record of previous collaboration between the Grantor and the third-party provider, unless waived by the Participating Lenders. The Support Program shall include an initial assessment of each tenant household and development of an individualized service plan (each, an "Individualized Service Plan") for each tenant household based on the initial or a subsequent assessment with measurable goals and objectives. Each Individualized Service Plan shall address: (i) maintaining successful tenancy, (ii) securing quality childcare, education, healthcare and recreational activities for any children in the household, (iii) Securing or improving adult education attainment and employment, (iv) improving and maintaining behavioral and physical health, (v) improving financial and asset management skills, and (vi) improving community connections. The entity implementing an Individualized Services Plan must document the individual or family's initial assessment and work plan, as well as track and document the individual or family's engagement and progress toward the goals and measures outlined in such Individualized Service Plan. Notwithstanding the foregoing, no occupant of an HTF Assisted Unit may be required to accept the services provided for in their Individualized Service Plan as a condition of his or her tenancy.

4. **Rent Schedule.** Except as is set forth in Sections 3.A. and 3.C, projected initial monthly maximum rents including utilities for all Restricted Units shall be as set forth in Exhibit B attached hereto. If permitted maximum rents and utility allowances as reflected in the annual schedule of rents and utility allowances issued by DHCD increase prior to initial occupancy of the Project, the initial monthly maximum rents and utility allowances shall be as set forth in the latest schedule issued by DHCD. Notwithstanding the rent restrictions set forth in Section 3 above, the maximum monthly rent permitted to be charged for a Restricted Unit at any particular income level is not required to be lower than the maximum rent applicable at such income level pursuant to Exhibit B or such higher initial maximum rent applicable at such income level pursuant to the immediately preceding sentence, regardless of changes in fair market rents or in median income over time (subject only to the restrictions applicable in the event of any federal or state subsidy, as set forth in Section 3 above). Rents for Restricted Units shall not be increased above applicable maximums without all Holders' prior written approval of a specific request by the Grantor for a rent increase, except for increases implemented in accordance with an annual schedule of maximum rents and allowances issued by DHCD. Notwithstanding the foregoing, rent increases shall be subject to the provisions of outstanding leases and shall not be implemented without at least thirty (30) days' prior written notice by the Grantor to all affected Residents and notwithstanding any provision in a lease or occupancy agreement to the contrary, in the event of any increase in the rent payable by such Residents in connection with an increase in the income of such Residents, consistent with the terms hereof, the Residents shall have the right to terminate their lease or occupancy agreement by written notice to the Grantor delivered within such thirty-day period.

5. Resident Selection.

A. Nondiscrimination. The Grantor shall not discriminate on the basis of race, religious creed, color, sex, age, marital status, sexual orientation (which shall not include persons whose sexual orientation involves minor children as the sex object), gender identity, genetic information, veteran status, membership in the armed forces, ancestry, national origin, handicap, blindness, hearing impairment, or because a person possesses a trained guide dog as a consequence of blindness, hearing impairment or other handicap of such person or any other basis prohibited by law in the lease, use and occupancy of the Units or in connection with the employment or application for employment of persons for the operation and management of the Units. The Grantor shall not discriminate against, or refuse to lease, rent or otherwise make available the Units to, a holder of a certificate or voucher under the Federal Rental Certificate Program or the Federal Rental Voucher Program because of the status of the prospective tenant as a holder of such certificate, voucher.

B. Selection Policies. The Grantor shall adopt and submit to the Holders for approval resident selection policies and criteria for the Restricted Units that are acceptable to the Holders and to DDS or DMH.

The Grantor shall also provide the Holders with an affirmative marketing plan acceptable to all Holders. The affirmative marketing plan must comply with all applicable statutes, regulations and executive orders, with all Holders' affirmative marketing requirements and with DHCD's directives reflecting the agreement between DHCD and HUD in the case of NAACP, Boston Chapter v. Kemp. The approved marketing plan and the approved resident selection policies and criteria shall be adhered to in every respect and any changes thereto shall be subject to the prior written approval of the Holders. The Grantor shall list vacancies in Restricted Units in the MassAccess Housing Registry at http://www.massaccesshousingregistry.org.

C. FCF Requirements. With respect to the Units required to be leased to FCF Eligible Residents pursuant to Section 3 above, provided that such units are leased to FCF Eligible Residents pursuant to resident selection policies that have been approved by DMH or DDS and that are consistent with the then applicable FCF Regulations and FCF Guidelines, the foregoing provisions of this Section 5 shall be waived to the extent inconsistent with said DMH or DDS resident selection policies and FCF Regulations and Guidelines.

6. Lease Form. The Grantor shall not include in any lease for a Restricted Unit any of the following provisions:

A. Agreement by the tenant to be sued, to admit guilt or to a judgment in favor of the Grantor in a lawsuit brought in connection with the lease.

B. Agreement by the tenant that the Grantor may take, hold, or sell personal property of household members without notice to the tenant and a court decision on the rights of the parties. This prohibition, however, does not apply to an agreement by the tenant concerning disposition of personal property remaining in the Unit after the tenant has moved out of the Unit. The Grantor may dispose of such personal property in accordance with state law.

C. Agreement by the tenant not to hold the Grantor or the Grantor's agents legally responsible for any action or failure to act, whether intentional or negligent.

D. Agreement of the tenant that the Grantor may institute a lawsuit without notice to the tenant.

E. Agreement by the tenant that the Grantor may evict the tenant or household members without instituting a civil court proceeding in which the tenant has the opportunity to present a defense, or before a court decision on the rights of the parties.

F. Agreement by the tenant to waive any right to a trial by jury.

G. Agreement by the tenant to waive the tenant's right to appeal, or to otherwise challenge in court, a court decision in connection with the lease.

H. Agreement by the tenant to pay attorney's fees or other legal costs even if the tenant wins in a court proceeding by the Grantor against the tenant. The tenant, however, may be obligated to pay costs if the tenant loses.

All leases for Restricted Units shall be consistent with the requirements set forth herein, shall be on a form reasonably approved by the Holders, shall be for terms of not less than one (1) year (unless a shorter term is specified by mutual agreement between the Resident and the Grantor, subject to the Holders' program requirements) and shall require tenants to provide information required for the Grantor to meet its reporting requirements hereunder. The Grantor may not terminate the tenancy except (i) for serious or repeated violation of the terms and conditions of the lease; (ii) for violations of applicable federal, state or local law; (iii) for completion of the tenancy period for transitional housing; or (iv) for other good cause. Any termination or refusal to renew must be preceded by not less than thirty (30) days by the Grantor's service on the tenant of a written notice specifying the grounds for the action.

7. Transfer Restrictions. The Grantor shall not sell, transfer, convey, rent (except for leases or occupancy agreements made in connection with the Permitted Uses that are substantially in the form approved by the Holders), encumber as security for financing, or in any other way exchange all or any portion of the Property nor shall the Grantor permit the sale, transfer or pledge of any direct or indirect interests in the Grantor, without the express written permission of the Holders. Without limiting the generality of the foregoing, the Permitted Encumbrances are hereby approved by the Holders. Any sale, transfer or other disposition (each, a "transfer") of all or any part of the Property shall further be subject to the Purchase Option and the First Refusal Right described below, and to such further terms and conditions with respect thereto as may be set forth in the FCF Statute, the FCF Regulations, and the FCF Guidelines. Upon request by the Grantor, DHCD shall sign a certificate, in form and substance reasonably acceptable to DHCD, stating whether, as of a specified date, any Purchase Option or First Refusal Right in favor of DHCD remains in effect, or has been exercised, terminated, waived or assigned, and otherwise conforming with the certification requirements described below. No transfer of all or any part of the Property to any party other than DHCD or its assignee shall be consummated unless and until (i) the period for the exercise of all Purchase Options and/or First Refusal Rights, as applicable, shall have expired without DHCD's exercise of rights thereunder or (ii) DHCD shall have unconditionally waived its rights thereunder in writing. In connection with any transfer requiring the consent of the Holders, the Grantor shall provide such information to the Holders as the Holders may reasonably request, shall pay a fee to DHCD pursuant to DHCD's then-current fee schedule and shall pay all legal fees incurred by the Holders in connection with such transfer request.

8. FCF Purchase Option.

A. After the thirtieth anniversary of the date hereof, DHCD shall have the right to purchase the Grantor's interest in the FCF Units from the Grantor, at a price equal to the then-current appraised value of the FCF Units, less the total outstanding balance, at the time of such purchase, of all principal, interest and any other charges payable under the FCF Loan, and any and all other outstanding obligations of the Grantor with respect thereto (the "FCF Purchase Option"), by delivering written notice to the Grantor of its election to exercise the FCF Purchase Option by or before the date that is one hundred twenty (120) days after the expiration of the thirtieth anniversary of the date hereof (the "Option Exercise Deadline"). If DHCD shall have failed to deliver such written notice of its election to exercise the FCF Purchase Option to the Grantor by the Option Exercise Deadline, DHCD shall be deemed to have unconditionally waived the FCF Purchase Option, and the FCF Purchase Option shall automatically terminate, and shall have no further force or effect.

B. DHCD shall have the right at any time to assign its rights under this FCF Purchase Option to a qualified developer selected by DHCD in accordance with the FCF Statute and FCF Regulations, and effective as of any such assignment, all rights and obligations of DHCD with respect to such FCF Purchase Option shall automatically be deemed to apply to such assignee, and all references to "DHCD" in this Section shall automatically be deemed to refer to such assignee (except to the extent a provision explicitly provides otherwise). So long as the Grantor is not in default under the FCF Loan or hereunder, the Grantor shall have the right to match the best offer received by DHCD from a qualified developer to become DHCD's assignee.

C. Promptly upon request by DHCD at any time or from time to time, either before the Option Exercise Deadline or after DHCD's exercise of the FCF Purchase Option, the Grantor shall provide DHCD with a copy of, or otherwise make available for DHCD's review at a mutually convenient time and location, any and all material owned by or readily available to the Grantor that an unrelated third-party potential buyer would reasonably request in connection with its due diligence for the acquisition of the FCF Units, including, by way of example but not of limitation, deeds, title insurance policies, appraisals, studies, reports, and other materials relating to the FCF Units and/or any encumbrance(s) subject to which the FCF Units is to be conveyed, or otherwise reasonably necessary or appropriate for DHCD to review in connection with its exercise of the FCF Purchase Option.

D. The appraised value of the FCF Units shall be determined at DHCD's request by the method specified in the FCF Statute (as may be more fully described in the FCF Regulations) and in accordance with DHCD policies, and the costs of the appraisers shall be shared equally by DHCD and the Grantor (unless the FCF Regulations provide otherwise). Notwithstanding anything to the contrary contained in this Restriction, the Grantor shall not be required to use its own funds to repay the pro rata share (based on proportion that the FCF Units represent of the total Units at the Property) of any debt secured by the Property that is attributable to the FCF Units in the event the appraised value of the FCF Units is less than the pro rata share of all permitted debt secured by the Property attributable to the FCF Units.

E. The closing for the sale of the FCF Units to DHCD shall take place in accordance with applicable provisions of the FCF Regulations, by or before the date that is one hundred twenty (120) days after the Option Exercise Deadline (i.e., on or before the date that is two hundred forty (240) days after the thirtieth anniversary of the date hereof), by the close of the business day, at the Registry of Deeds; provided, however, that if DHCD reasonably determines additional time is necessary to effect the closing due to delays of the Grantor in providing DHCD with the due diligence material described above or any other failure by the Grantor fully to cooperate with preparations for the sale, the closing date may be extended to a date reasonably determined by DHCD as necessary to redress the delays caused by the Grantor, which shall be specified in a written notice from DHCD setting forth the reasons for such extension, delivered to the Grantor by or before the date originally scheduled for the closing. The parties may also mutually agree to extend the date of the closing by written instrument.

F. If the FCF Units are less than all of the Units at the Property, Grantor shall be responsible for either subdividing the FCF Units from the balance of the Units or creating a condominium at the Property in which the FCF Units will be a separate condominium unit. In the latter case, the condominium documents governing such condominium shall be subject to the approval of DHCD in its sole discretion.

G. The transfer to DHCD pursuant to the FCF Purchase Option shall be subject to such other requirements as may be more fully described in the FCF Regulations consistent with the FCF Statute. Adjustments in the purchase price for recording fees, deed stamps and other charges shall be made, and any other issues associated with the transfer shall be resolved, in accordance with standard conveyancing practice in The Commonwealth of Massachusetts. If either party so desires, the parties shall enter into a purchase and sale agreement memorializing the terms of the sale, consistent with the terms hereof and of the FCF Statute; provided, however, that the FCF Purchase Option shall be binding regardless of whether the parties execute a purchase and sale agreement. Notwithstanding any other provision hereof to the contrary, if, after delivering notice of its intention to exercise the FCF Purchase Option, DHCD determines, in its sole discretion, that it is not in the best interests of DHCD to effect the purchase, DHCD may terminate the FCF Purchase Option at any time, upon written notice to the Grantor recorded with the

Registry of Deeds; provided, however, that such termination right shall apply to DHCD only and not to any assignee.

H. Concurrently with its acquisition of the FCF Units, DHCD shall cause to be recorded with the Registry of Deeds an affordable housing restriction, in compliance with the FCF Statute and any other applicable statutory requirements for the same (and, in the case of an assignee, in form acceptable to DHCD, in its discretion), which shall require that the FCF Units shall be used only for the purposes of preserving or providing FCF Community-based Housing or FCF Supportive Housing thereon, which housing shall remain affordable for a period of not less than forty (40) years.

9. FCF First Refusal Right.

A. If the Grantor intends at any time or from time to time prior to DHCD's exercise (or unconditional waiver) of the FCF Purchase Option, as described above, to transfer all or some of the FCF Units, including a sale of any part of its interest in the Property that includes all or some of the FCF Units, and the Grantor receives a bona fide offer for such transfer that the Grantor desires to accept (each, an "Offer"), the Grantor shall promptly deliver to DHCD written notice of the same (which shall not be deemed to have been duly delivered to DHCD unless it contains a copy of clause C. below), together with a copy of such Offer (the "Offer Notice"). The Grantor shall provide DHCD with such reasonable evidence as DHCD may require to satisfy DHCD as to the bona fide nature of the Offer. For purposes of this Section, a purchase by the Sponsor shall not be considered an Offer that triggers the FCF First Refusal Right. A transfer of a limited partner interest in the Grantor shall be considered an Offer that triggers the FCF First Refusal Right if (x) such limited partner interest is all or substantially all of the limited partner interests in the Grantor (except for transfers to affiliates of the limited partner) and (y) such transfer takes place within one year of a transfer of a general partner interest in the Grantor or of a controlling interest in a general partner of the Grantor to the transferee of the limited partner interest or an affiliate of such transferee, provided that a removal of a general partner by a limited partner pursuant to a removal provision in the partnership agreement of the Grantor and the substitution of a new general partner that is an affiliate of such limited partner shall not constitute a transfer of a general partner interest for purposes of this clause. If the Offer also relates to a portion or portions of the Property other than FCF Units, Grantor shall also indicate the portion of the overall purchase price attributable to FCF Units, which shall equal a pro rata portion of the overall purchase price based on the proportion that FCF Units represent of the total Units being sold.

B. DHCD shall have the right to purchase the Grantor's interest in the FCF Units (or the portion(s) thereof to which the Offer relates), at the same price (or pro rata portion thereof) and on the same terms set forth in such Offer (the "FCF First Refusal Right"), by delivering to the Grantor and recording with the Registry of Deeds written notice of its election to exercise such FCF First Refusal Right, in accordance with the terms set forth below (the "Exercise Notice"), by or before the date that is one hundred twenty (120) days after DHCD's receipt of such Offer Notice (such 120-day period, the "FCF First Refusal Period"). If DHCD does not intend to exercise the FCF First Refusal Right, DHCD may, but shall have no obligation to, notify the Grantor in writing that the FCF First Refusal Right will not be exercised (a "Waiver Notice").

C. If, by the expiration of the FCF First Refusal Period with respect to an Offer, DHCD shall have failed to deliver to the Grantor an Exercise Notice or a Waiver Notice, DHCD shall be deemed to have waived its FCF First Refusal Right with respect to such Offer, subject to any revived FCF First Refusal Right with respect to a modified Offer, as described below. However, DHCD shall retain an FCF First Refusal Right for subsequent Offers and the FCF Purchase Option as described above, notwithstanding any prior actual or deemed waiver of the FCF First Refusal Right, or any intervening transfer of all or some of the FCF Units. The FCF First Refusal Right shall automatically expire upon the waiver, expiration or exercise of the FCF Purchase Option.

D. If any of the terms of an Offer shall be revised from the terms reflected in the Offer Notice in such a manner as to be materially more favorable to the buyer or if a closing pursuant to the Offer has not occurred on or before the date six months after the date of the Offer Notice but the Grantor desires to continue pursuing a sale pursuant to such Offer, the Grantor shall promptly deliver to DHCD an Offer Notice with respect to such revised or continued Offer (which shall not be deemed to have been duly delivered to DHCD unless it contains a copy of clause C. above), and DHCD shall have a new FCF First Refusal Right with respect to such modified or continued Offer. The FCF First Refusal Period for such new FCF First Refusal Right shall run for a period of one hundred twenty (120) days from the date of DHCD's receipt of the Offer Notice with respect to such revised or continued Offer.

E. DHCD shall have the right at any time to assign its rights under the FCF First Refusal Right to a qualified developer selected by DHCD in accordance with the FCF Statute and FCF Regulations and, effective as of any such assignment, the rights and obligations of DHCD with respect to such FCF First Refusal Right shall automatically be deemed to apply to such assignee, and all references to "DHCD" in this Section shall automatically be deemed to refer to such assignee (except to the extent a provision explicitly provides otherwise). DHCD shall provide written notice of any such assignment to the Grantor.

F. In accordance with the provisions of the FCF Statute:

(i) An Offer Notice containing the required language as described above shall be deemed to have been duly delivered if sent by regular and certified mail, return receipt requested (or by such other method as may be authorized under the FCF Statute and FCF Regulations), addressed to DHCD (or to any assignee of DHCD, if DHCD has previously given the Grantor notice of such assignment, including the name and notice address of such assignee, in accordance with the notice provisions set forth herein) in the care of the keeper of records for DHCD, which for purposes hereof shall be deemed to be the General or Chief Counsel of DHCD (or in care of the keeper of records for such assignee of DHCD, as applicable).

(ii) The Exercise Notice or Waiver Notice shall be duly signed by a designated representative of DHCD or of the assignee of DHCD, as the case may be, and (x) mailed to the Grantor by certified mail (or such other method as may be authorized under the FCF Statute) at the notice address set forth in the Offer Notice and (y) recorded with the Registry of Deeds by the expiration of the FCF First Refusal Period. If DHCD shall have assigned the FCF First Refusal Right to a qualified developer prior to delivery of the Exercise Notice, the Exercise Notice shall include the name and address of such assignee and the terms and conditions of such assignment.

(iii) An affidavit acknowledged by a notary public that DHCD or its designated representative has mailed an Exercise Notice or a Waiver Notice (the "Affidavit") shall conclusively establish the manner and time of the giving of such notice. Any Affidavit may be recorded with the Registry of Deeds by either party. Each Affidavit shall have attached to it a copy of the Offer Notice to which it relates.

(iv) Each Offer Notice, Exercise Notice and Waiver Notice shall contain the name of the record owner of the Property and a description of the FCF Units to be transferred, in form adequate to identify the same.

G. The closing for the sale of the FCF Units (or, if applicable, the FCF Units that are the subject of the Offer) to DHCD shall take place in accordance with applicable provisions of the FCF Regulations, by or before the date that is one hundred twenty (120) days after the expiration of the FCF First Refusal Period (i.e., on or before the date that is two hundred forty (240) days after DHCD's receipt of the relevant Offer Notice), by the close of the business day, at the Registry of Deeds (such date, the "Closing Deadline"); provided, however, that if DHCD reasonably determines additional time is necessary to effect the closing, due to delays of the Grantor in providing DHCD with the due diligence material described below or any other failure by the Grantor fully to cooperate with preparations for the sale, the Closing Deadline may be extended to a date reasonably determined by DHCD as necessary to redress the delays caused by the Grantor, which shall be specified in a written notice from DHCD setting forth the reasons for such extension, delivered to the Grantor and recorded with the Registry of Deeds, by or before the date originally scheduled for the closing. The parties may also mutually agree to extend the Closing Deadline, by written instrument; provided, however, that in such event, the parties shall execute an instrument reflecting such extension, which shall be recorded with the Registry of Deeds by or before the date originally scheduled for the closing.

H. Concurrently with the delivery of the Offer Notice, the Grantor shall provide DHCD with a copy of, or otherwise make available for DHCD's review at a mutually convenient time and location, all material relating to the FCF Units (or the FCF Units that are the subject of the Offer) and/or the proposed sale, transfer, or other disposition thereof that has been made available to the party making the Offer, and shall thereafter promptly make available to DHCD any additional material made available to such party. Promptly upon any request therefor by DHCD, the Grantor shall provide DHCD with a copy of, or otherwise make available for DHCD's review at a mutually convenient time and location, any and all other material owned by or readily available to the Grantor that an unrelated third-party buyer would reasonably request in connection with its due diligence for an acquisition of such FCF Units, including, by way of example but not of limitation, deeds, title insurance policies, appraisals, studies, reports, or other materials relating to such FCF Units and/or any encumbrance(s) subject to which the FCF Units are to be conveyed, or otherwise reasonably necessary or appropriate for DHCD to review in connection with its exercise of the FCF First Refusal Right.

I. The transfer to DHCD pursuant to the FCF First Refusal Right shall be subject to such other requirements as may be more fully described in the FCF Regulations consistent with the FCF Statute. Adjustments in the purchase price for recording fees, deed excise stamp taxes and other charges shall be made, and any other issues associated with the transfer shall be resolved, in accordance with standard conveyancing practice in The Commonwealth of Massachusetts. If either party so desires, the parties shall enter into a purchase and sale agreement memorializing the terms of the sale, consistent with the terms hereof and of the FCF Statute; provided, however, that the FCF First Refusal Right shall be binding regardless of whether the parties execute a purchase and sale agreement. Notwithstanding any other provision hereof to the contrary, if, after delivering notice of its intention to exercise the FCF First Refusal Right, DHCD determines, in its sole discretion, that it is not in the best interests of DHCD to effect the purchase, DHCD may terminate the FCF First Refusal Right at any time, upon written notice delivered to the Grantor and recorded with the Registry of Deeds; provided, however, that such termination right shall apply to DHCD only, and not to any assignee. If DHCD exercises such termination right or if either DHCD or its assignee (other than the Sponsor) fails to perform hereunder on or before the Closing Deadline through no fault of the Grantor, then the FCF First Refusal Right shall lapse and be of no further force or effect.

J. If the FCF Units are less than all of the Units at the Property and if the Offer also relates to a portion or portions of the Property other than FCF Units, Grantor shall be responsible for either subdividing the relevant FCF Units from the balance of the Units or creating a condominium at the Property in which the relevant FCF Units will be a separate condominium unit. In the latter case, the condominium documents governing such condominium shall be subject to the approval of DHCD in its sole discretion.

K. Concurrently with its acquisition of the Property, DHCD shall cause to be recorded with the Registry of Deeds an affordable housing restriction, in compliance with the FCF Statute and any other applicable statutory requirements for the same (and, in the case of an assignee, in form acceptable to DHCD, in its discretion), which shall require that such Property shall be used only for the purposes of preserving or providing affordable housing thereon, which housing shall remain affordable for a period of not less than forty (40) years.

10. Term of Restrictions; Covenants to Run with Land. The term of this Restriction shall be perpetual. Notwithstanding any provision to the contrary herein or in any of the other Loan Documents, this Restriction shall remain in full force for the full term set forth herein including any extension, notwithstanding any prepayment of the Loan. The restrictions contained herein shall run with the land, shall bind the successors and assigns of the Grantor, and shall inure to the benefit of the Holders and their successors and assigns as permitted herein. Notwithstanding the foregoing, at the end of the term of affordability for a particular program, as set forth on Exhibit

C, as it may have been extended, provided that all obligations under the loan provided by such Program have been satisfied in full at that time, as determined by the appropriate Holder, the Grantor may request that the Holders modify this Restriction to eliminate the requirements imposed by or otherwise relating to such Program set forth in this Restriction. The parties shall cooperate to prepare an appropriate amendment to this Restriction, which amendment shall be duly recorded with the Registry of Deeds by the Grantor at its cost and expense. Notwithstanding the foregoing, this Restriction shall not expire until the recording in the Registry of Deeds of a written determination by the Secretary of EOHHS, the Secretary of Administration of Finance, and the Commissioner of DDS or DMH (whichever shall have determined the eligibility of Residents for the Property), that there is no longer a need to maintain and use the Property as FCF Community-based Housing.

11. Subsequent Conveyances. Each and every contract, deed or other instrument hereafter executed conveying the Property or portion thereof shall expressly provide that such conveyance is subject to this Restriction, provided, however, that the covenants contained herein shall survive and be effective regardless of whether such contract, deed or other instrument hereafter executed conveying the Property or portion thereof provides that such conveyance is subject to this Restriction.

12. Income Verification. The Grantor represents, warrants and covenants that the determination of whether a Family occupying a Restricted Unit meets the income requirements set forth herein shall be made by the Grantor at the time of leasing of a Restricted Unit and thereafter at least annually on the basis of the current income of such Family. In initially verifying a Family's income, the Grantor shall examine at least 2 months of source documents evidencing annual income (e.g., wage statements, interest statements, unemployment compensation statements) for the Family.

13. Reporting Requirements.

A. **DHCD Web-Based Report.** Annually, no later than September 30, Grantor and/or Sublessee shall submit to DHCD, via the web-based annual reporting system located at https://hedhsgdevannualreport.azurewebsites.net, or as otherwise instructed, an annual report consisting of all data required by DHCD regulations at 760 CMR 61.00 promulgated pursuant to Chapter 334 of the Acts of 2006 and all applicable DHCD directives, guidelines and forms as may be amended from time to time. The Grantor shall collect said data for the express purpose of reporting to DHCD, and the collection and reporting of said data shall comply with said regulations, directives, guidelines and forms.

B. **Annual Report.** Annually, no later than September 30, Grantor and/or Sublessee shall submit to each Holder an annual report consisting of the following:

(i) Annual adjusted income of each Family occupying a Restricted Unit.

(ii) Monthly gross rents (rents plus utility allowances, if applicable) for all Restricted Units, such rents to be consistent with the schedule of maximum rents published annually by DHCD. The rent schedule shall include the maximum rents applicable to Restricted

Units under Section 3 as well as the actual rents to be charged to over-income Families under Section 3.

(iii) Records required as part of the Support Program defined in Section 3.G above, if any.

(iv) The Grantor and/or Sublessee's certification, made to the best knowledge and belief of the officer or individual signing such certification, that:

(a) The Property continues to be used for the Permitted Uses.

(b) The Property continues to contain the required number of Low Income Units and Extremely Low Income Units and to comply with the rent and other restrictions applicable to such Restricted Units.

(c) Grantor has not transferred, pledged or encumbered any interest in the Property, except as specifically provided in, and in accordance and compliance with the terms of, this Restriction.

(d) Grantor and Sublessee have caused the Property to be maintained in a manner consistent with the Statutes, Regulations and Guidelines and no children under six years old reside in or occupy the Property within the meaning of the Lead Paint Law or, if such children do reside in or occupy the Property, that the Property is in compliance with the Lead Paint Law.

(e) The Support Program has been and is being operated in compliance with the terms of this Restriction. Reporting requirements in connection with the Support Program are subject to further DHCD guidance.

(f) The information submitted pursuant to this Paragraph B is true and accurate.

C. **Confidentiality.** The Holders and the Grantor shall treat as confidential any of the foregoing information relating to a specific Resident or Unit in compliance with all applicable state and federal statutes and regulations, including M.G.L. c. 66A, and shall implement adequate systems and procedures for maintaining the confidentiality of such information (but the Holders and the Grantor may release general statistical and other information about the Property, so long as the privacy rights and interests of the individual Residents are protected). The Holders and the Grantor shall not use any of the foregoing information in Paragraph A.(iii) for any purpose described in Section 603(d)(1) of the federal Fair Credit Reporting Act (15 U.S.C. § 1681a(d)(1)) or in any manner that would cause a Holder or Grantor to be considered a "consumer reporting agency" under Section 603(f) of the federal Fair Credit Reporting Act (15 U.S.C. § 1681a(f)).

D. **Additional Reports.** Grantor shall prepare and submit to the Holders such additional reports as any Holder may deem necessary to ensure compliance with the requirements of this Restriction and of the Programs.

E. **Records.** The Grantor shall maintain as part of its records (i) copies of all leases of Restricted Units; (ii) all initial and annual income certifications by Residents of Restricted Units; (iii) the records required in connection with the Support Program set forth in

Section 3 above and (iv) such additional records as any Holder may deem necessary to ensure compliance with the requirements of this Restriction and of the Programs.

F. **Additional Reporting Requirements.** Additional reporting requirements are stipulated in the Loan Agreement.

14. No Demolition. The Grantor shall not demolish any part of the Improvements or substantially subtract from any real or personal property included within the Property except in conjunction with renovation or rehabilitation of the Units or construction of a new project on the Property, in either case subject to the prior written consent of all Holders, which consent may be granted or withheld in a Holder's sole judgment.

15. Casualty. The Grantor represents, warrants and agrees that if the Property, or any part thereof, shall be damaged or destroyed, the Grantor (subject to the approval of the lender(s) providing financing) will use its best efforts to repair and restore the Units to substantially the same condition as existed prior to the event causing such damage or destruction, and the Grantor represents, warrants and agrees that the Units shall thereafter continue to operate in accordance with the terms of this Restriction.

16. Inspection. The Grantor hereby grants to each Holder and its duly authorized representatives the right to enter the Property (a) at reasonable times and in a reasonable manner (with prior notice except in the event of an emergency) for the purpose of inspecting the Property to determine compliance with this Restriction or any other agreement between the Grantor and such Holder and (b) after thirty (30) days' prior written notice, to take any reasonable and appropriate action under the circumstances to cure any violation of the provisions of this Restriction. The notice referred to in clause (b) shall include a clear description of the course and approximate cost of the proposed cure.

17. Enforcement. Upon violation by the Grantor of any of the provisions of this Restriction that remains uncured for more than thirty (30) days after notice thereof from any Holder (or for such longer period not to exceed thirty (30) days as shall be reasonably required under the circumstances to cure such violation, provided that the Grantor has commenced the cure of such violation within the initial thirty (30) day period and is thereafter diligently pursuing the cure to completion), any Holder, at its option (without liability to any party for failure to do so), may apply to any court, state or federal, for specific performance of this Restriction or an injunction against any violation of this Restriction, or for such other relief as may be appropriate, since the injury arising from the default under any of the terms of this Restriction would be irreparable and the amount of damage would be difficult to ascertain and may not be compensable by money alone. In each such default notice, the Holder giving such notice shall specify the violation in question and the actions such Holder believes are necessary and feasible to remedy such violation. No waiver by a Holder of any breach of this Restriction shall be deemed a waiver of such breach by any other Holder or a waiver of any other or subsequent breach. No act or omission by any Holder, other than a writing signed by it waiving a breach by the Grantor in accordance with the next Section hereof, shall constitute a waiver thereof. Any Holder shall be entitled to recover from the Grantor all of such Holder's reasonable costs of an action for enforcement of this Restriction, including reasonable attorneys' fees (including the time of any in-house counsel of a Holder charged at the same rate as comparable outside attorneys). By its acceptance of this Restriction, no Holder undertakes any liability or obligation relating to the condition of the Property. Without limiting any other rights or remedies available to a Holder, any transfer of all or any other portion of the Property in violation of the provisions hereof, in the absence of a certification from all Holders approving, or waiving any restrictions with respect to, the same, all as set forth above, shall, to the maximum extent permitted by law, be voidable by any Holder, by suit in equity to enforce the restrictions hereof.

18. Compliance Certification. Upon written request therefor, a Holder shall provide a statement in form acceptable for recording certifying that the Grantor is in full compliance with the provisions hereof as relate to that Holder, provided such Holder believes that the Grantor is so in compliance. Upon receipt of a written request therefor, if a Holder shall believe that the Grantor is not so in compliance, such Holder shall provide such a recordable certification specifying in detail the section or sections hereof with which such Holder believes the Grantor not to be in compliance. Any third party dealing with the Grantor may rely for all purposes on the truth and completeness of such a certification of a Holder.

19. Senior Lender Foreclosure.

A. Notwithstanding anything herein to the contrary, but subject to the provisions of this Section, if the holder of record of a first mortgage granted to a state or national bank, state or federal savings and loan association, cooperative bank, mortgage company, trust company, insurance company or other institutional or governmental lender shall acquire the Property by reason of foreclosure or similar remedial action under the provisions of such mortgage or upon conveyance of the Property in lieu of foreclosure, and provided that the holder of such mortgage has given the Holders and the Secretary of EOHHS not less than sixty (60) days' prior written notice of its intention to foreclose upon its mortgage or to accept a conveyance of the Property in lieu of foreclosure to attempt to structure a workout or other arrangement to avoid such foreclosure, conveyance in lieu of foreclosure, or similar remedial action and the Secretary of EOHHS has failed within such sixty (60) days to locate a purchaser for the Property who is capable of operating the Property for the Permitted Uses subject to the provisions of this Restriction and who is reasonably acceptable to such mortgage holder, then except as provided below, the rights and restrictions herein contained shall not apply to such mortgage holder upon such acquisition of the Property or to any purchaser of the Property from such mortgage holder, and such Property shall, subject to Paragraph B. below, thereafter be free from all such rights and restrictions. The recording in the Registry of Deeds of a sworn affidavit by the foreclosing mortgagee certifying as to the failure of the Secretary of EOHHS to meet the foregoing deadline may be relied upon by any third party, provided that the foreclosure deed is recorded not more than six (6) months after the receipt by the Secretary of EOHHS of the foreclosure notice. Notwithstanding the foregoing, the rights and restrictions contained herein shall terminate only to the extent it is financially infeasible to maintain the level of affordability required by this Restriction or some lesser level of affordability (i.e., fewer Restricted Units or Restricted Units affordable to Families with higher Household Incomes than those required by this Restriction). "Financially infeasible" shall mean (i) with respect to the operation of the Property, that the rent and other income from the Property is, or is reasonably projected to be, less than the reasonable expenses required (or reasonably projected to be required) to maintain and operate the Property and (ii) with respect to a sale of the Property, that the restrictions would prevent (or be reasonably projected to prevent) the senior mortgage holder from recovering all amounts due and owing with respect to its financing of the Property, including without limitation, principal, interest, charges, costs, expenses, late fees and prepayment premiums. Financial infeasibility shall be determined by the senior mortgage holder in its sole discretion after consultation with the Holders. The senior mortgage holder shall notify the Holders of the extent to which the rights and restrictions contained herein shall be terminated and the Grantor agrees to execute any documents required to modify this Restriction to conform to the senior mortgage holder's determination. The Grantor hereby irrevocably appoints any senior mortgage holder and each of the Holders, its true and lawful attorney-in-fact, with full power of substitution, to execute, acknowledge and deliver any such documents on behalf of the Grantor should the Grantor fail or refuse to do so.

B. The rights and restrictions contained herein shall not lapse if the Property is acquired through foreclosure or deed in lieu of foreclosure by (i) the Grantor, (ii) any person with a direct or indirect financial interest in the Grantor, (iii) any person related to a person described in clause (ii) by blood, adoption or marriage, (iv) any person who is or at any time was a business associate of a person described in clause (ii), and (v) any entity in which any of the foregoing have a direct or indirect financial interest (each a "Related Party"). Furthermore, if the Property is subsequently acquired by a Related Party during the period in which this Restriction would have remained in effect but for the provisions of this Section, this Restriction shall be revived and shall apply to the Property as though it had never lapsed.

C. In the event such mortgage holder conducts a foreclosure or other proceeding enforcing its rights under such mortgage and the Property is sold for a price in excess of the sum of the outstanding principal balances of all notes secured by mortgages of the Property plus all future advances, accrued interest and all reasonable costs and expenses which the holders thereof are entitled to recover pursuant to the terms of such mortgages, such excess shall be paid to the Holders in consideration of the loss of the value and benefit of the rights and restrictions herein contained and released by the Holders pursuant to this Section in connection with such proceeding, provided that in the event that such excess shall be so paid to the Holders by such mortgage holder, the Holders shall thereafter indemnify such mortgage holder against loss or damage to such mortgage holder resulting from any claim made by the mortgagor of such mortgage to the extent that such claim is based upon payment of such excess by such mortgage holder to the Holders in accordance herewith, provided that such mortgage holder shall give the prompt notice of any such claim and shall not object to intervention by the Holders in any proceeding relating thereto. The Holders shall share any such excess pro rata in proportion to the respective amounts of principal and interest (if any) then outstanding on their portions of the Loan and the liability of a Holder under the foregoing indemnity shall be limited to the amount of such excess received by it. To the extent the Grantor possesses any interest in any amount which would otherwise be payable to the Holders under this Paragraph, to the full extent permissible by law, the Grantor hereby assigns its interest in such amount to said mortgage holder for payment to the Holders.

20. Notices. Except for any notice required under applicable law to be given in a different manner, any notice, request or other communication which any party hereto may be required or may desire to give hereunder shall be made in writing, and shall be deemed to have been properly given if hand delivered, if sent by recognized overnight courier, receipt confirmed, or if mailed by United States registered or certified mail, postage prepaid, return receipt requested, addressed to the parties at their respective addresses first set forth above, or to such other address as the party to be served with notice may have furnished in writing to the party seeking or desiring to serve notice as a place for the service of notice. A notice sent by any of the foregoing methods shall be deemed given upon documented receipt or refusal.

21. Successors and Assigns; No Third-Party Beneficiaries. This Restriction shall be binding upon the Grantor and its successors and assigns, and shall burden the Property as specified herein. This Restriction shall also be binding upon the Holders, and shall inure to the benefit of their successors and assigns, provided that a Holder shall not voluntarily assign its rights hereunder unless (a) such Holder believes in good faith that it is no longer reasonably capable of performing its duties hereunder, and (b) such assignment shall be to a governmental body or an entity of a similar character and purposes to such Holder which is reasonably capable of performing such duties hereunder (except that DHCD's rights with respect to the FCF Purchase Option and FCF First Refusal Right are assignable, as set forth herein). Notwithstanding the delegation of authority by DHCD to CEDAC for CEDAC to act as a Holder hereunder, DHCD shall also be a Holder hereunder and may act at any time in its own name to pursue any rights and remedies of a Holder hereunder; provided that as to the Grantor or any third party, any recorded instrument granting any approval or consent or otherwise affecting the Property under the FCF Program is duly executed by either CEDAC or DHCD shall be binding on the other for all purposes.

22. Severability; Construction. All rights, powers and remedies provided herein may be exercised only to the extent that exercise thereof does not violate any applicable law, and are intended to be limited to the extent necessary so that they will not render this Restriction invalid, unenforceable or not entitled to be recorded, registered or filed under applicable law. If any provision or part hereof shall be affected by such holding, the validity of other provisions of this Restriction and of the balance of any provision held to be invalid, illegal or unenforceable, in part only, shall in no way be affected thereby, and this Restriction shall be construed as if such invalid, illegal, or unenforceable provision or part hereof had not been contained herein. In the event of any actual or potential inconsistency between the terms of this Restriction and any of the Statutes and/or the Regulations, such terms shall be interpreted, to the extent reasonably possible, so as to reconcile any such inconsistencies. If such provisions cannot reasonably be reconciled, the provisions of the Statutes, the Regulations and this Restriction, in the foregoing order of priority, shall control.

23. Governing Law. This Restriction shall be governed by the laws of The Commonwealth of Massachusetts. Inasmuch as the restrictions contained herein have been imposed upon the

Property in part to satisfy requirements of various governmental bodies referred to herein, including, without limitation, DHCD, the restrictions contained herein are intended to be construed as a restriction held by a governmental body with the benefit of Section 26 of Chapter 184 of the Massachusetts General Laws as existing as of the date hereof, such that the restrictions contained herein shall not be limited in duration by any rule or operation of law, but rather shall run for the full term thereof.

24. Recording. The Grantor, at its cost and expense, shall cause this Restriction and any amendment hereto to be duly recorded with the Registry of Deeds (and if necessary or appropriate, re-recorded), shall pay or cause to be paid all recording, filing, or other taxes, fees and charges and shall comply with all such statutes and regulations as may be required by law in order to establish, preserve and protect the ability of the Holders and their successors and assigns to enforce this Restriction.

25. Further Assurances. Each Holder is authorized to record or file any notices or instruments appropriate to assuring the enforceability of this Restriction; and the Grantor on behalf of itself and its successors and assigns appoints each Holder its attorney-in-fact to execute, acknowledge and deliver any such instruments on its behalf. Without limiting the foregoing, the Grantor and its successors and assigns agrees to execute any such instruments upon request. The benefits of this Restriction shall be in gross and shall be assignable by any Holder. The Grantor and the Holders intend that the restrictions arising hereunder take effect upon the date hereof, and to the extent enforceability by any person ever depends upon the approval of governmental officials, such approval when given shall relate back to the date hereof regardless of the date of actual approval or the date of filing or recording of any instrument evidencing such approval.

26. Counterparts. This Restriction may be executed in several counterparts, each of which when executed and delivered shall be an original, but all of which together shall constitute one instrument. In making proof of this Restriction, it shall not be necessary to produce or account for more than one such counterpart executed by the party against whom enforcement of this Restriction is sought.

27. Incorporation of Exhibits and Riders. Any and all exhibits and riders attached hereto or otherwise referenced herein are hereby incorporated by reference, the same as if each were fully set forth herein.

28. Amendment; Waiver. This Restriction may not be amended, nor may any obligation hereunder be waived or released, without first obtaining the written consent of all Holders.

29. Ground Lessor and Sublessee Assent. The Grantor is the tenant under a Ground Lease of the Property from Town of Dennis (the "Ground Lessor") as landlord and fee owner, dated on or about the date hereof, notice of which is recorded with the Barnstable Registry of Deeds herewith. The Ground Lessor hereby joins in the grant of this Restriction and agrees, for itself and its successors and assigns, to be bound by all of the terms and conditions hereof for the term of this Restriction, whether or not said Ground Lease is terminated for any reason, to the same extent as if the Ground Lessor were the named Grantor hereunder. The Sublessee also hereby joins in the grant of this Restriction and agrees, for itself and its successors and assigns, to be bound by all of the terms and conditions hereof for the term of this Restriction, to the same extent as if the Sublessee were the named Grantor hereunder.

No documentary stamps are required as this Restriction is not being purchased by the Holders.

[SIGNATURES TO APPEAR ON FOLLOWING PAGE]

Executed under seal as of the date set forth above.

GRANTOR:

FRIENDS OR RELATIVES WITH AUTISM & RELATED DISABILITIES- F.O.R.W.A.R.D., INC.

By: Kathleen M. Ohman
Name: Kathleen M. Ohman
Title: President

By:
Name: Mark Ameres
Title: Treasurer

SUBLESSEE:

CAPE ABILITIES, INC.

By: ______________________________
Name: Jonathan Sproul
Title: President

By: ______________________________
Name: John Citron
Title: Treasurer

COMMONWEALTH OF MASSACHUSETTS

Barnstable County, ss.

On this 15th day of January, 2021, before me, the undersigned notary public, personally appeared Kathleen M. Ohman, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as President of Friends Or Relatives With Autism & Related Disabilities - F.O.R.W.A.R.D., Inc., for its stated purpose as the voluntary act of Friends Or Relatives With Autism & Related Disabilities - F.O.R.W.A.R.D., Inc.

Evelyn K. Coughlin

Notary Public

My commission expires:

EVELYN K. COUGHLIN
Notary Public
Commonwealth of Massachusetts
My Commission Expires
December 3, 2021

COMMONWEALTH OF MASSACHUSETTS

Barnstable County, ss.

On this 15th day of January, 2021, before me, the undersigned notary public, personally appeared Mark Ameres, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as Treasurer of Friends Or Relatives With Autism & Related Disabilities - F.O.R.W.A.R.D., Inc., for its stated purpose as the voluntary act of Friends Or Relatives With Autism & Related Disabilities - F.O.R.W.A.R.D., Inc.

Evelyn K. Coughlin

Notary Public

My commission expires:

EVELYN K. COUGHLIN
Notary Public
Commonwealth of Massachusetts
My Commission Expires
December 3, 2021

Executed under seal as of the date set forth above.

GRANTOR:

FRIENDS OR RELATIVES WITH AUTISM & RELATED DISABILITIES- F.O.R.W.A.R.D., INC.

By: ______________________________
Name: Kathleen M. Ohman
Title: President

By: ______________________________
Name: Robert F. Duffy
Title: Treasurer

SUBLESSEE:

CAPE ABILITIES, INC.

By: ______________________________
Name: Jonathan Sproul
Title: President

By: John N. Citron
Name: John Citron
Title: Treasurer

COMMONWEALTH OF MASSACHUSETTS

Barnstable County, ss.

On this 15 day of July, ~~2019,~~ 2020 before me, the undersigned notary public, personally appeared Jonathan Sproul, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as President of Cape Abilities, Inc., for its stated purpose as the voluntary act of Cape Abilities, Inc.

Notary Public Ana Brodeur
My commission expires: 09/16/2022

ANA BRODEUR NOTARY PUBLIC COMMONWEALTH OF MASSACHUSETTS MY COMMISSION EXPIRES ON 09-16-2022

COMMONWEALTH OF MASSACHUSETTS

Barnstable County, ss.

On this 17 day of July, ~~2019,~~ 2020 before me, the undersigned notary public, personally appeared John Citron, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as Treasurer of Cape Abilities, Inc., for its stated purpose as the voluntary act of Cape Abilities, Inc.

Notary Public Jessica M DeLuca
My commission expires: 10/28/2022

Jessica M. DeLuca
Notary Public
COMMONWEALTH OF MASSACHUSETTS
My Commission Expires
October 28, 2022

TOWN OF DENNIS
by its Board of Selectman

BY:

Christopher Flanagan
Christopher Flanagan

BY:

John Terrio

BY:

Robert Mezzadri

BY:

Christopher Lambton

BY:

Sheryl A. McMahon

COMMONWEALTH OF MASSACHUSETTS

Barnstable County, ss.

On this 20 day of January, 2021, before me, the undersigned notary public, personally appeared Dennis Select Board, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as Selectman of the Town of Dennis, for its stated purpose as the voluntary act of the Board of Selectman of the Town of Dennis.

Sara P. McDonald

Notary Public

My commission expires: August 2, 2024

SARA P. McDONALD
NOTARY PUBLIC
Commonwealth of Massachusetts
My Commission Expires
August 2, 2024

MassDocs
AFFORDABLE HOUSING RESTRICTION

TOWN OF BARNSTABLE:

The Inhabitants of the Town of Barnstable a Massachusetts municipal corporation known as the Town of Barnstable organized under a charter adopted pursuant to Mass. Const. Amend. Art. 89 § 3 on April 11, 1989, having an address at New Town Hall, 367 Main Street, Hyannis Massachusetts 02601

By: [signature]
Name: MARK S. ELLS
Title: TOWN MANAGER

COMMONWEALTH OF MASSACHUSETTS

Barnstable County, ss.

On this 28 day of January, ~~2020~~ 2021, before me, the undersigned notary public, personally appeared Mark S. Ells, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as Town Manager of the Inhabitants of the Town of Barnstable a Massachusetts municipal corporation known as the Town of Barnstable organized under a charter adopted pursuant to Mass. Const. Amend. Art. 89 § 3 on April 11, 1989, for its stated purpose as the voluntary act of the ____________ of the Inhabitants of the Town of Barnstable a Massachusetts municipal corporation known as the Town of Barnstable organized under a charter adopted pursuant to Mass. Const. Amend. Art. 89 § 3 on April 11, 1989.

Susan J. Robbins
Notary Public
My commission expires: 2/22/24

{00053266 4}

CEDAC:

Community Economic Development Assistance Corporation, a body politic and corporate, duly organized and existing in accordance with Chapter 40H of the Massachusetts General Laws

By: ____________________________

Name: Roger Herzog

Title: Executive Director

COMMONWEALTH OF MASSACHUSETTS

Suffolk County, ss.

On this 21 day of February, 2020, before me, the undersigned notary public, personally appeared Roger Herzog, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as Executive Director of the Community Economic Development Assistance Corporation, for its stated purpose as the voluntary act of the Executive Director of the Community Economic Development Assistance Corporation.

____

Notary Public

My commission expires: 9/19/2025

ERIN ABBERTON
Notary Public
COMMONWEALTH OF MASSACHUSETTS
My Commission Expires On
September 19, 2025

{00053266 3}

DHCD:

The Commonwealth of Massachusetts acting by and through the Department of Housing and Community Development

By: [signature]
Name: Catherine Racer
Title: Director

COMMONWEALTH OF MASSACHUSETTS

Suffolk County, ss.

On this 17th day of November, 2020, before me, the undersigned notary public, personally appeared Catherine Racer, proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she signed it voluntarily, as Director of the Department of Housing and Community Development, for its stated purpose as the voluntary act of the Director of the Department of Housing and Community Development.

[signature]

Notary Public

My commission expires:

BERTHA BORIN
Notary Public
COMMONWEALTH OF MASSACHUSETTS
My Commission Expires
March 11, 2022

[redacted]

AFFORDABLE HOUSING RESTRICTION

TOWN OF BREWSTER,
by its Select Board

David Whitney, Chair

Mary Chaffee, Vice-Chair

John Dickson, Clerk

Cynthia Bingham, Member

~~David Whitney,~~ Member
Benjamin deRuyter

COMMONWEALTH OF MASSACHUSETTS

Barnstable, County, ss.

On this 18th day of May, 2020, before me, the undersigned notary public, personally appeared David Whitney, Mary Chaffee, John Dickson, Cynthia Bingham, Benjamin deRuyter member of the Brewster Select Board, as aforesaid, who proved to me through satisfactory evidence of identification, which was (a current driver's license) (a current U.S. passport) (my personal knowledge of the identity of the principal), to be the person whose name is signed on the preceding or attached document, and acknowledged to me that he/she/they signed it voluntarily, for its stated purpose as the voluntary act on behalf of the Town of Brewster.

Notary Public

My commission expires: May 11, 2023

COLETTE M. WILLIAMS
JUSTICE OF THE PEACE
Commonwealth of Massachusetts
My Commission Expires
May 11, 2023

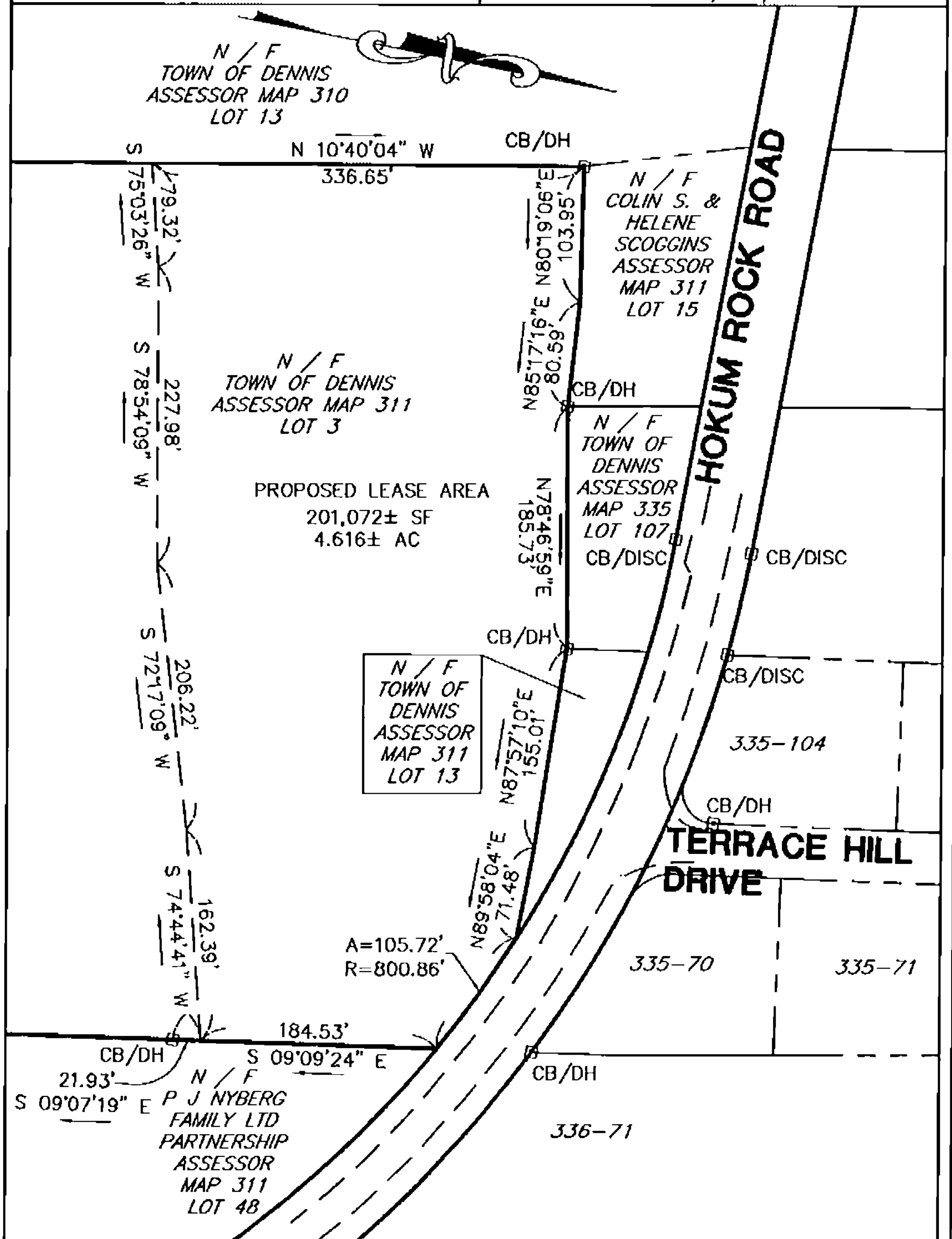
EXHIBIT A : PROPERTY DESCRIPTION

"A certain parcel of land located off Hokum Rock Road, Dennis, Massachusetts, containing a total of 4.616±acres, which is a portion of the land shown on Town Assessor's Map 311 as Parcel 3 and shown on a plan of land entitled "Lease Exhibit Plan in Dennis, MA, Address: 131 Hokum Rock Road, Dennis, MA, Prepared for: FORWARD, P.O. Box 1174, S. Dennis, MA," dated January 10, 2019, prepared by Baxter Nye Engineering & Surveying, a copy of which is attached hereto and incorporated herein as a portion of this Exhibit A."

Lease Exhibit Plan in Dennis, MA

Address: 131 Hokum Rock Road, Dennis, MA.

Prepared For : FORWARD	SHEET 1 OF 1
P.O. BOX 1174 S. Dennis, MA.	Date: 01/10/19



Baxter Nye Engineering & Surveying
Registered Professional
Engineers and Land Surveyors
78 North Street, 3rd Floor
Hyannis, MA 02601
Phone – (508) 771-7502 Fax – (508)-771-7622

Scale : 1" = 100'

DRAFT

EXHIBIT B : PROJECTED INITIAL RENT SCHEDULE

(Rents assume that the Grantor pays all utilities. An allowance for any utilities paid by tenants must be deducted from these rents. Utility allowances are available from the local housing authority.)

	INCOME LEVEL				
UNIT TYPE	**EXTREMELY LOW INCOME**	**VERY LOW INCOME**	**LOW INCOME**	**MODERATE INCOME**	**HIGH MODERATE INCOME**
SRO	$360.00	$600.00	$720.00	$960.00	$1,321.00
STUDIOS	$481.00	$801.00	$961.00	$1,281.00	$1,762.00
1-BR	$515.00	$858.00	$1,029.00	$1,373.00	$1,887.00
2-BR	$618.00	$1,030.00	$1,236.00	$1,647.00	$2,266.00
3-BR	$720.00	$1,190.00	$1,428.00	$1,903.00	$2,618.00
4-BR	$864.00	$1,327.00	$1,593.00	$2,123.00	$2,920.00

EXHIBIT C: INITIAL AFFORDABILITY MATRIX

		INCOME CATEGORY				
NUMBER/SIZE OF UNITS REQUIRED BY	**TERM**	HIGH MODERATE INCOME (100% AMI)	MODERATE INCOME (80% AMI)	LOW INCOME (60% AMI)	VERY LOW INCOME (50% AMI)	EXTREMELY LOW INCOME (30% AMI)
HTF	30 years	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	8 SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR
FCF	30 years	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	8 SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR
TOWN OF DENNIS	Perpetual	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	8 SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR
TOWN OF BARNSTABLE	Perpetual	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	8 SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR
TOWN OF BREWSTER	Perpetual	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR	8 SRO ____ Studio ____ 1-BR ____ 2-BR ____ 3-BR ____ 4-BR
COMPOSITE		____ SRO ____ STUDIO ____ 1-BR ____ 2-BR	____ SRO ____ STUDIO ____ 1-BR ____ 2-BR	____ SRO ____ STUDIO ____ 1-BR ____ 2-BR	____ SRO ____ Studio ____ 1-BR ____ 2-BR	8 SRO ____ STUDIO ____ 1-BR ____ 2-BR

		______ 3-BR ______ 4-BR	______ 3-BR ______ 4-BR	______ 3-BR ______ 4-BR	______ 3-BR ______ 4-BR	______ 3-BR ______ 4-BR

EXHIBIT D: ADDITIONAL DEFINITIONS

Following are additional definitions used in this Affordable Housing Restriction:

"Area" shall mean Barnstable, MA MSA.

"Bedroom Adjusted AMI" applicable to a Unit shall mean the median income for the Area, with adjustments for the number of bedrooms in such Unit, as determined from time to time by HUD pursuant to Section 8 of the United States Housing Act of 1937, as amended. For purposes of adjustments for the number of bedrooms in a Unit, a Unit that does not have a separate bedroom is assumed to be occupied by one individual and a Unit with one or more separate bedrooms is deemed assumed to be occupied by 1.5 individuals for each bedroom (with the total number of individuals rounded up).

"CPA Guidelines" shall mean the bylaw of the Town of Dennis, the Town of Barnstable, and the Town of Brewster accepting the provisions of Sections 3 through 7 of the CPA Statute, together with any guidelines issued by the Town of Dennis and the Dennis Community Preservation Committee and the Town of Barnstable and the Barnstable Community Preservation Committee and the Town of Brewster and the Brewster Community Preservation Committee regarding the CPA Program, as the same may be amended, supplemented, replaced or otherwise modified from time to time.

"CPA Program" shall mean the Community Preservation Fund loan program established by the Town of Dennis, the Town of Barnstable, and the Town of Brewster under the CPA Statute under which the Town of Dennis, the Town of Barnstable, and the Town of Brewster makes loans available to sponsors of certain types of affordable housing and for other purposes authorized by the CPA Statute.

"CPA Statute" shall mean Chapter 44B of the Massachusetts General Laws, as the same may be amended, supplemented, replaced or otherwise modified from time to time.

"CPA Regulations" shall mean the informational Guidance Release 01-207 (September 2001), Informational Guidance Release 00-209 (December 2000) and any other bulletins, opinions, guidance or regulations relating to the CPA Statute issued or promulgated by the Commissioner of Revenue of The Commonwealth of Massachusetts, as the same may be amended, supplemented, replaced or otherwise modified from time to time.

"EOHHS" shall mean the Executive Office of Health and Human Services of the Commonwealth of Massachusetts (or any successor thereto or designee thereof).

"Extremely Low Income Family" shall mean a Family whose Household Income is less than or equal to thirty percent (30%) of the Family-size Adjusted AMI.

"Fair Market Rent" shall mean the fair market rent in the Area for a comparably-sized dwelling as established by HUD under regulations promulgated at 24 C.F.R. §888.11 (or successor regulations), minus a monthly allowance established by the Holders for any utilities and services (excluding telephone) to be paid by the occupying Family.

"Family" shall have the meaning set forth in 24 C.F.R. §5.403 (or any successor regulation). Notwithstanding the foregoing, a household comprised of a full-time student or students shall not qualify as a Family except as permitted under the federal low-income housing tax credit program pursuant to Section 42(i)(3)(D) of the Internal Revenue Code of 1986, as amended.

"Family-size Adjusted AMI" shall mean the median income for the Area, adjusted for family size, as determined from time to time by HUD pursuant to Section 8 of the United States Housing Act of 1937, as amended.

"FCF Community-based Housing" shall mean a non-institutional housing development, or a Unit therein, (i) that is reserved for FCF Eligible Residents and (ii) that constitutes one of the following types of housing:

(a) "Group Home" or "Single Room Occupancy Housing," which shall mean a residence that provides separate sleeping facilities for each Resident. The residence must also provide facilities for living, eating, cooking and sanitation for all Residents; however, these facilities may be shared.

(b) "Scattered Site Housing," which shall mean a residence that provides separate facilities for living, sleeping, eating, cooking and sanitation for each Resident.

"FCF Eligible Resident" shall mean a client of EOHHS who has been found eligible for non-institutional housing by DDS or DMH and who satisfies the eligibility criteria set forth in the FCF Regulations and under the FCF Guidelines.

"FCF Guidelines" shall mean the guidelines relating to the FCF Program issued by DHCD and/or CEDAC pursuant to the FCF Statute and the FCF Regulations, as the same may be updated, amended, or otherwise revised from time to time.

"FCF Program" shall mean the Facilities Consolidation Fund loan program, established for the purpose of facilitating the creation of community-based housing, under which DHCD contracts to make funds available through CEDAC and other financial intermediaries, for such financial intermediaries to loan to sponsors of Community-based Housing for Individuals with Mental Illness or Individuals with Intellectual Disabilities, subject to and in accordance with the provisions of the FCF Statute.

"FCF Regulations" shall mean the regulations relating to the FCF Program promulgated by DHCD at 760 Code of Massachusetts Regulations, Section 19.00 et. seq., as the same may be amended, supplemented, replaced or otherwise modified from time to time.

"FCF Statute" shall mean Section 2 of Chapter 129 of the Acts of 2013 (budget line item 7004 0040), as affected by Section 19 of Chapter 129 of the Acts of 2013, as the same may be amended, supplemented, replaced or otherwise modified from time to time.

"Grantor" shall mean the Grantor named on the first page hereof or any successor or assign thereof permitted under Section 8 of this Restriction, including any party holding ownership interests in or with respect to the Property.

"Guidelines" shall mean the HTF Guidelines, the FCF Guidelines, and the CPA Guidelines.

"High Moderate Income Family" shall mean a Family whose Household Income is less than or equal to one-hundred percent (100%) of the Family-size Adjusted AMI.

"Holder" shall mean each of DHCD, CEDAC, the Town of Dennis, the Town of Barnstable, and the Town of Brewster or, as applicable, each successor or assign of the foregoing and "Holders" shall mean all of the foregoing parties, collectively.

"Household Income" shall mean a Family's adjusted annual income determined in the manner set forth in 24 C.F.R. §5.609 (or any successor regulations).

"HTF Guidelines" shall mean the guidelines issued by DHCD regarding the HTF Program, as the same may be amended, supplemented, replaced or otherwise modified from time to time.

"HTF Program" shall mean the federal Housing Trust Fund program under which DHCD makes funds available to sponsors of certain types of affordable housing.

"HTF Regulations" shall mean 24 CFR Parts 91 and 93.

"HUD" shall mean the United States Department of Housing and Urban Development.

"Improvements" shall mean the building or buildings on the Property presently containing, or after completion of the planned construction to contain, the number of Units indicated on the first page hereof, and all other authorized buildings, structures and improvements located on the Property from time to time, all equipment and fixtures therein, and any authorized repair, improvement, reconstruction, restoration, renovation, or replacement of a capital nature thereto or otherwise on the Property.

"Individual with Intellectual Disabilities" shall mean an individual DDS determines is eligible to receive services and subsidies provided by DDS.

"Individual with Mental Illness" shall mean an individual DMH determines is eligible to receive services and subsidies provided by DMH.

"Loan" shall mean collectively, the loans for the Project being provided to the Grantor under the Programs.

"Loan Documents" shall mean collectively, the documents evidencing and securing the Loan.

"Low Income Family" shall mean a Family whose Household Income is less than or equal to sixty percent (60%) of the Family-size Adjusted AMI.

"Moderate Income Family" shall mean a Family whose Household Income is less than or equal to eighty percent (80%) of the Family-size Adjusted AMI.

"Over-income Rent" shall mean, for a particular over-income Family, a monthly rent equal to the lesser of (x) the maximum amount payable by the Family under the laws of the municipality in which the Property is located or of The Commonwealth of Massachusetts, (y) one-twelfth of thirty percent (30%) of the Family's Household Income as recertified annually or (z) the comparable market rent for the Family's Unit, but in no event lower than the rent such Family was paying prior to becoming an over-income Family.

"Permitted Encumbrances" shall mean those encumbrances on the Property identified in the mortgage granted to the Holders of even or near date herewith.

"Permitted Uses" shall mean use of the Improvements for the number of rental Units indicated on the first page hereof, including the number of Restricted Units indicated on the first page hereof of which at least eight Units (containing a total of not less than eight bedrooms) shall be reserved for Individuals with Mental Illness or Individuals with Intellectual Disabilities and shall qualify as FCF Community-based Housing or consistent with the FCF Statute, FCF Regulations and FCF Guidelines. Such Permitted Uses shall include activities and/or services of a nature to benefit the Residents of the Restricted Units and/or to benefit use of the Improvements as FCF Community-based Housing.

"Programs" shall mean the HTF Program, the FCF Program, and the CPA Program.

"Property" shall mean that certain parcel or parcels of land located at the Property Address indicated on the first page hereof and more particularly described in Exhibit A attached hereto, together with all Improvements thereon.

"Registry of Deeds" shall mean the Barnstable Registry of Deeds.

"Regulations" shall mean the HTF Regulations and the FCF Regulations.

"Residents" shall mean the lawful occupants of the Units.

"Restricted Unit" shall mean a Unit required by the terms hereof to be rented to an Extremely Low Income Family or a Unit required by the terms hereof to be reserved as FCF Community-based Housing.

"SRO Unit" shall mean a single-room (zero bedroom) Unit intended for occupancy by a single eligible Resident and that may contain partial food preparation and/or sanitary facilities.

"Statutes" shall mean the HTF Statute, the FCF Statute, and the CPA Statute.

"Studio Unit" shall mean a single-room (zero bedroom) Unit that contains a complete kitchen and bathroom.

"Sublessee" shall mean the Sublessee named on the first page hereof or any successor or assign thereof permitted under Section 8 of this Restriction.

"Unit" shall mean any residential unit located on the Property.

"Very Low Income Family" shall mean a Family whose Household Income is less than or equal to fifty percent (50%) of the Family-size Adjusted AMI.